

EXPERT GROUP ON TIMBER AND TRADE STATISTICS

Minutes of the meeting held in Silvan House, 231 Corstorphine Road, Edinburgh, on Thursday 24 April 2014

Present: Jeremy Darot (Secretary), Stuart Goodall, David Leslie, Nick Moore, Richard Palmer, John Paterson, Sheila Ward, George Webb, Peter Weston (Chair), Kyle Williams, Tony Willis

Apologies: Alan Christison, Roger Coppock, Alan Corson, Neil Cowan, Michael Fairgrieve, Cameron Maxwell, David Sulman

1. APPROVAL OF PREVIOUS MINUTES (16 December 2013)

Peter Weston welcomed Stuart Goodall (Confor) and Kyle Williams (NRW) to the group. He will send a note to Chris Inglis to thank him for his past contributions.

The minutes were agreed.

2. MATTERS ARISING

A. Actions completed since the last meeting

Action: Kyle Williams has been nominated as the representative for Wales on the EGTTS.

Action: Statistics team sent draft reports of the statistical reviews of the fencing survey and UK wood imports & exports to the group. No comments were received from the group, and the reports were published on the statistics website. The topic is covered in agenda item 3.

Action: Group suggested an addition to the list of roundwood and chip exporters. There were no amendments received from the group regarding the removals, sawmill, fencing and pellets distributions lists.

Action: Statistics team added a question on removals under movement licence to the removals questionnaire. The topic is covered in agenda item 3.

Action: Peter Weston and Jeremy Darot scheduled an afternoon session following the group meeting to review of the 50 year forecast. The topic is covered in agenda item 7.

Action: David Leslie is the EGTTS contact point regarding the review Forest Mensuration, Modelling, Forecast Review.

B. Actions outstanding

Stuart Goodall indicated that an online resource on the UK timber industry had been produced a few years ago (UK Wood Info), but that it needed updating and publicising.

Action: Confor to come back to the group with a proposal about updating the UK timber industry online resource. Statistics team will continue to provide statistics, and will provide links to the online resource from the FC web pages.

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

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

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

3. STATISTICS (Sheila Ward / Jeremy Darot)

Sheila Ward and 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 improved. *UK Wood Production and Trade: 2013 provisional figures* will be published on 15 May 2014.

A list of large non-respondents was circulated prior to the meeting and Tony Willis and David Leslie have provided help with encouraging more responses and providing estimates.

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

Discussion of the draft UK wood production figures covered the following points:

- The discrepancy between softwood removals and deliveries;

Action: Statistics team to check woodfuel estimates.

- New statistics on removals under a movement licence;

Action: Statistics team to clarify in the release what is and is not covered in the removals under licence figures.

Action: Statistics team to revisit the wording of the questionnaires for next year's survey.

- Miscellaneous issues.

Action: George Webb to follow up with Alistair Kerr regarding the apparent discrepancy between wood-based panels inputs and production.

Action: Statistics team to include the conversion factor diagram from *Forestry Statistics* in the back of *UK Wood Production and Trade*.

Action: Statistics team to include pellets as a separate category in the trade tables of *UK Wood Production and Trade*.

Action: Statistics team to include conversion factors in JFSQ.

The Statistics team considered using Wood Recyclers Association data to estimate exports figures. It is not straightforward to map WRA data to specific commodity codes, but the data could potentially be used to sense-check the HMRC figures.

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

The response to the pellet survey improved in 2014, however data from the FC Scotland woodfuel demand and usage survey could potentially be used for small non-respondents, and in the future if response rates decrease.

4. TIMBER UTILISATION UPDATE (Nick Moore)

Nick Moore presented an update on his timber utilisation work, including initial estimates for 2013. Further estimates will become available over the next few months and Nick Moore will present the final estimates at the November meeting.

Action: Jeremy Darot to circulate the Timber Utilisation Update presentation.

5. FOREST MENSURATION, MODELLING, FORECAST REVIEW UPDATE (Peter Weston)

Peter Weston presented a draft briefing paper ahead of the first meeting of the review group on 20 May 2014. The review references the models underpinning the NFI, but is separate from the NFI itself.

Several members expressed their support for the work, which underpins much of forestry data and research.

6. AOB

John Paterson updated the group on the current industry effort to collect private sector timber prices data, which is progressing well, and covers roundwood (excluding sawlogs), chips, sawdust and recycled fibre.

Action: John Paterson to give a presentation to the group on private sector timber prices data at the next meeting, with a focus on communicating and explaining the different indices.

Action: Jeremy Darot to invite Alastair Sandels (Fountains Forestry) for this presentation.

7. AFTERNOON SESSION: REVIEW OF 50 YEAR FORECAST (Ben Ditchburn)

Hamish MacLeod (BSW) joined the meeting for this agenda item.

Ben Ditchburn gave an overview of the results and key messages from the 50 year softwood and hardwood forecasts, to be published in separate releases on 30 April 2014. The group was invited to comment.

Action: NFI team to stress in the beginning of the reports that the figures are a forecast of availability, not production.

Action: NFI team to clarify assumptions regarding hard to harvest sites, and highlight access issues in the report.

Action: NFI team to include a combined (FC plus non-FC) bar chart showing GB standing volume, increment and production.

Action: NFI team to modify references to current demand in the conclusions.

8. DATE OF NEXT MEETING (AND REMAINING FOR 2014)

Thursday 14 August 2014

Thursday 20 November 2014