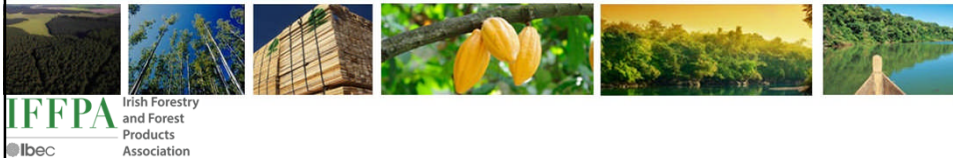


Forest Industry – Scale and Value to Economy



– Confor asks:

- What industry can deliver economic growth, new jobs and low-carbon housing, reduce imports and help save the planet?

– Answer:

- Forestry & Wood

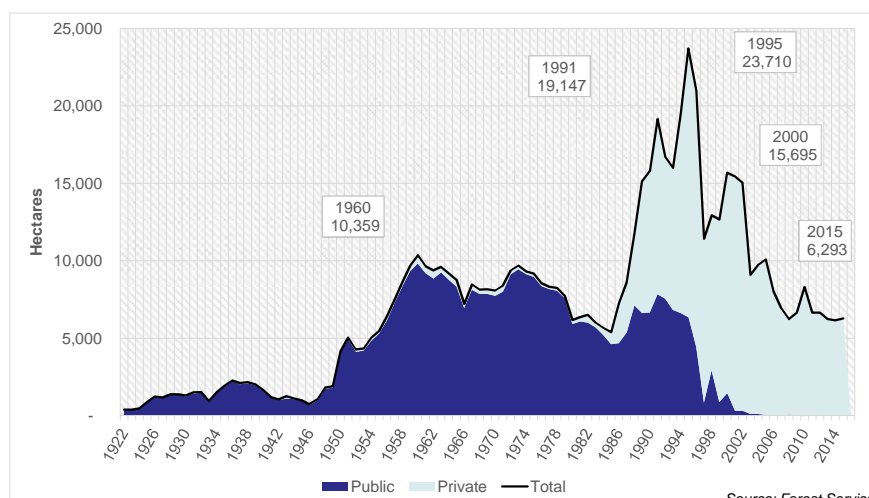
Background

IFFPA Irish Forestry and Forest Products Association
ibec

- 1903: State forestry begins; Dept of Agriculture & Technical Instruction
- 1920: <1% forest cover
- 1950s: Annual Affor – 10,000ha per annum
- 1980: 5.6% forest cover
- 1980-1990: Move from state to private forestry
- 1990-1999: 168,841 ha planted
- 2000-2015: 143,346 ha planted

Afforestation 1922-2015

IFFPA Irish Forestry and Forest Products Association
ibec



WHY?

- Hugely important natural resource
- Timber is used everywhere:
 - Fuel;
 - Fencing;
 - Transport;
 - Construction;
 - Sawmill and Harvesting Residues:
 - MDF / OSB
 - Biomass
 - Carbon

From This



To These

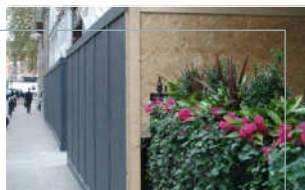
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● Ibec



Wood Pellets



Fence



OSB Hoarding




Construction

Society Needs Forestry

IFFPA Irish Forestry and Forest Products Association
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Forestry Today



- Area: 750,351 ha – 10.7% (EU: 38%)
 - State: 54%
 - Private: 46%
- Roundwood harvest 2015: 3.2 million m³
- Value to Ireland:
 - €2.3 Billion (1.4% GDP)
 - Employment: 12,000
- Export oriented
 - 78% of forest products were exported in 2015

Forestry Today

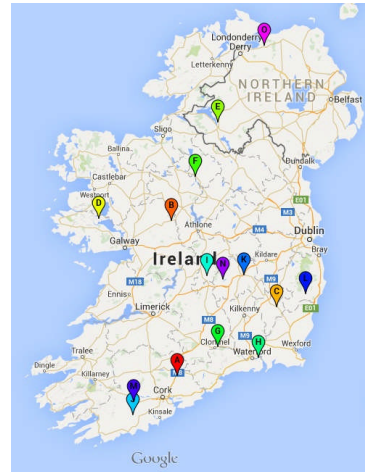


- Forest Products Exported: €355 million
- Sawn Softwood Exports: €121 million
- Panel Exports: €190 million
- 53% of sawmill output used in construction
- Private Sector Profile:
 - Dominated by the Family Forest
 - More than 20,000 owners
 - 84% of which are Family Forests
 - 8ha: Average holding

Processing

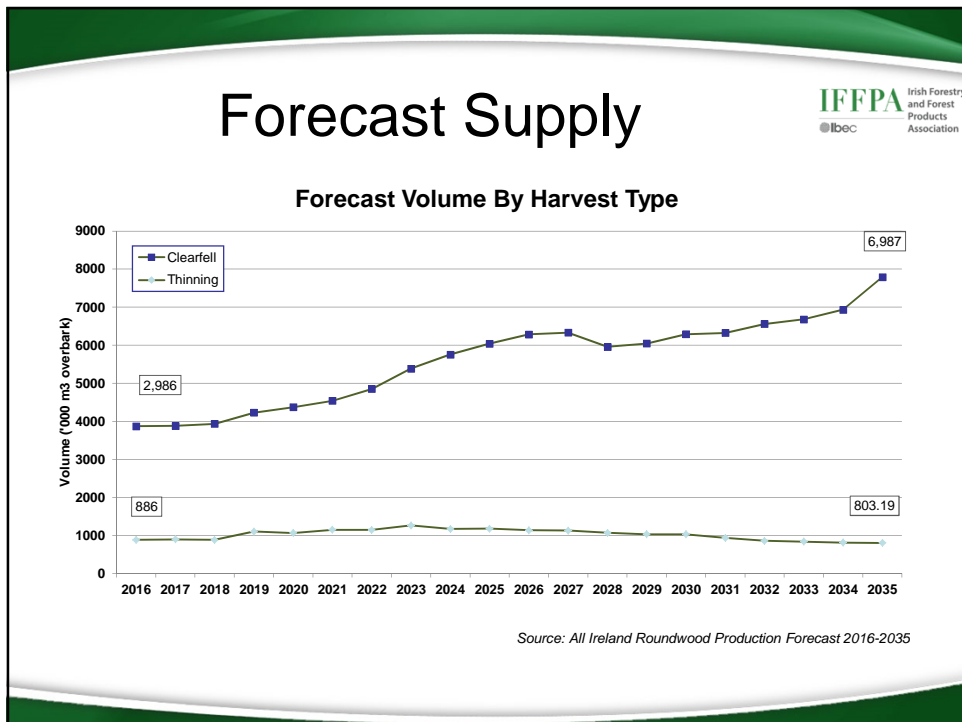
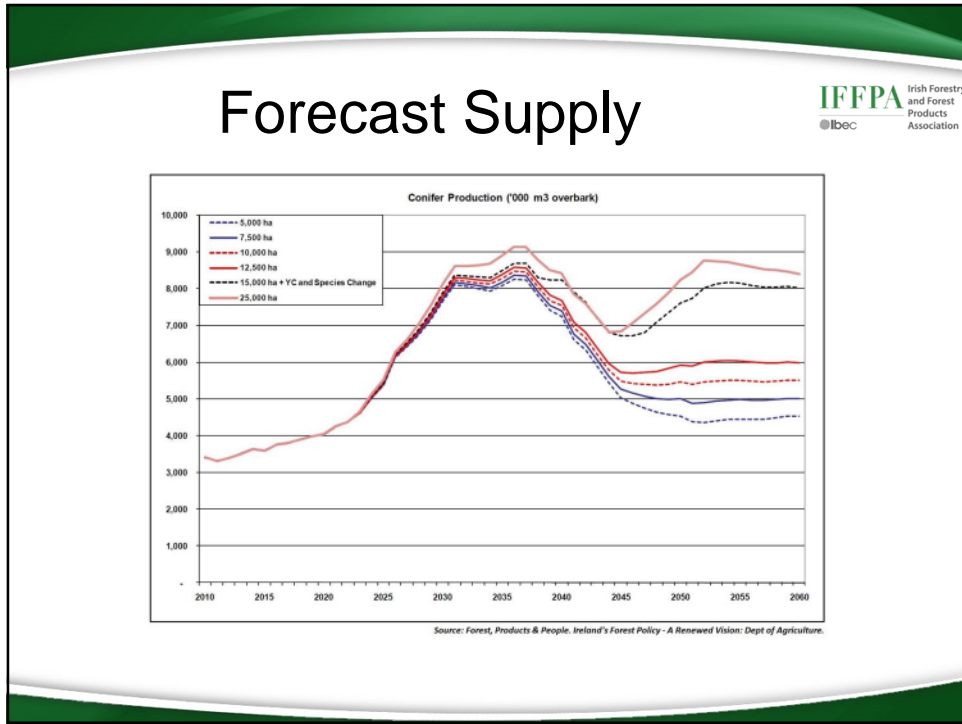
Major Timber Processors

- Glennons
- Murrays Ballygar
- Murrays Ballon
- ECC Timber
- Balcas
- Masonite
- Medite
- SmartPly
- Standish
- Grainger Sawmills
- Laois Sawmills
- Woodfab
- Palfab
- Coolrain Sawmill
- Drenagh Sawmills



Future Potential

- Private sector
 - About to become productive
 - Driving future supply growth
 - Next 20 years: roundwood harvest up from
 - 3.1 million m³ in 2014
 - 6 million m³ in 2028
 - Increase from the private estate
 - Peak supply in mid-2030s



Foreign Sectors

- New Zealand
 - Ministry for Primary Industries
 - Forestry is third largest export earner
 - 3.2% of NZ GDP
 - 2014 harvest was 30 million m³
 - Potential increase – 40%
 - Seeking NZ\$12 billion in exports by 2022
 - Operate an Emission Trading Scheme

Challenges

- Supply
 - Sawmills continue to import
- Entrances:
 - Current planning requirements
- Road network
- Harvesting infrastructure:
 - Training
- Brexit:
 - What is the future relationship?
 - Currency fluctuations

What The Sector Is Doing



- Positive Engagement
 - Managing Timber Transport – Good Practice Guide
 - Case Studies
 - Agreed Routes
 - National & Regional Events
- Training
 - Harvest Operator Training Project
- Variable Tyre Pressure
 - Reduce impact on road network

Thank You

IFFPA

