Talking Timber – Where Forest Owners Meet the Industry

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Teagasc,
Forestry Development Department,
IRELAND
Age profile of private plantations
(source: Forest Service)
Forecast of net realisable volume to 2028 (source: COFORD 2011)
Number of Private Felling Licences Received 2015

- 6 - 41
- 42 - 77
- 78 - 113
- 114 - 149
- 150 - 185
- GFL (1346)
- FL (281)
Wood Mobilisation Group - Stakeholder group established in 2010 by COFORD

ISSUE:

Round numbers – 1 million cubic metres gap in supply v demand in 2014, doubling to 2 million by 2020

Shortfall is most acute in energy wood and sawlog – for the latter reaching 0.91 million cubic metres in 2020
Challenge – COFORD Wood Mobilisation Working Group

Demand for forest fibre exceeds supply
roundwood imports & processing sector operating below capacity

Timber prices in Ireland have been relatively good compared to e.g. UK but there is harvestable timber that is not coming on to the market

What are the barriers to wood mobilisation?
How can we mobilise the forecasted increase in roundwood production between now and 2028?
COFORD Wood Mobilisation Working Group - Objectives

To identify and make recommendations on issues impacting on access to and mobilisation of wood resources at the national level, taking into account cost effectiveness and related issues.

Further understand and assess ways to address projected shortfalls in wood fibre supply on the island.
Need to continue to provide information and advice relevant to private woodland owners and others on wood mobilisation and develop on this service (Recommendations 15-20)

Increase awareness of the impacts of felling practices and rotation lengths on future assortment availability and profitability.

Research, development and demonstration investment needed related to thinning and wood mobilisation generally (Priority 1).
Mobilising the current and future private timber resource is critical and will require sustained activity and support from the various stakeholders including:

- Forest owners
- Forest Service
- Timber harvesting and processing sector
- Forest companies and consultants
- Education and training
- Advisory services
- Research sector

In summary........

Teagasc in its role as the state advisory and training service must respond to this challenge
What we are doing in Teagasc

Research:
- Thinning protocols – species, sites
- Financial appraisal tool development - FIVE
- Developed tools for planning scheduling and forecasting timber supply at local, regional and national level (CLUSTER, SUPPLYCHIP, FORECAST)

Education – Ballyhaise College
- Training of general operatives, forest supervisors and managers
- Harvesting operative training (chainsaw, harvester, forwarder)

Training of landowners (knowledge, competency, skills)
- Forest management
- Thinning evaluation
- Timber measurement
- Chainsaw training
- Advice & Knowledge Transfer
Knowledge Transfer

Field events

Courses

Information evenings

Advisory visits

Skills training
Teagasc support to Forest Owner Groups

- Initial setup and technical support
- Building GIS capacity
- Support to DAFM KT Groups
- Website support
Talking Timber – Networking and Information for Forest Owners

Organised by Teagasc in association with:

• Forest Service
• Irish Forestry and Forest Products Association (IFFPA)

• Industry collaboration
  • Sawmillers/Timber buyers
  • Harvesting contractors
  • Forest owner associations and representative organisations
  • Forest management companies
  • Health and Safety Authority
<table>
<thead>
<tr>
<th>Year</th>
<th>Date</th>
<th>Location</th>
<th>Attendance</th>
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<tbody>
<tr>
<td>2012</td>
<td>08-Mar</td>
<td>Bailieborough, Co. Cavan</td>
<td>100</td>
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<tr>
<td>2012</td>
<td>13-Mar</td>
<td>Abbeyleix, Co. Laois</td>
<td>200</td>
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<tr>
<td>2012</td>
<td>15-Mar</td>
<td>Loughrea, Co. Galway</td>
<td>80</td>
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<td>2012</td>
<td>21-Mar</td>
<td>Macroom, Co. Cork</td>
<td>90</td>
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<tr>
<td>2013</td>
<td>10-Sep</td>
<td>Templeglantine, Co. Limerick</td>
<td>240</td>
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<td></td>
<td>12-Sep</td>
<td>Drumshambo, Co. Leitrim</td>
<td>300</td>
</tr>
<tr>
<td>2014</td>
<td>26-Aug</td>
<td>Kildalton, Co. Kilkenny</td>
<td>230</td>
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<tr>
<td></td>
<td>02-Sep</td>
<td>Mullingar, Co. Westmeath</td>
<td>300</td>
</tr>
<tr>
<td>2015</td>
<td>08-Sep</td>
<td>Claremorris, Co. Mayo</td>
<td>200</td>
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<tr>
<td></td>
<td>15-Sep</td>
<td>Tullow, Co. Carlow</td>
<td>250</td>
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<tr>
<td>2016</td>
<td>07-Sep</td>
<td>Letterkenny, Co. Donegal</td>
<td>125</td>
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<td></td>
<td>15-Sep</td>
<td>Ennis, Co. Clare</td>
<td>200</td>
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<td>16-Sep</td>
<td>Tralee, Co. Kerry</td>
<td>200</td>
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<td><strong>2515</strong></td>
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<td>Date</td>
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<td>Sept 7th</td>
<td>Talking Timber</td>
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<td></td>
<td><em>Radisson Blu Hotel, Letterkenny, Co. Donegal</em></td>
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<td>Sept. 15th</td>
<td>Talking timber</td>
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<td></td>
<td><em>Auburn Lodge Hotel, Ennis, Co Clare</em></td>
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<td>Sept. 16th</td>
<td>Talking timber</td>
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<td></td>
<td><em>The Rose Hotel, Tralee, Co Kerry</em></td>
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<td>Nov. 15th</td>
<td>Broadleaf marketing event</td>
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<td></td>
<td><em>Manor Hotel, Abbyleix, Co Laois</em></td>
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Overview of promotional tools

Printed media

• Wide range of press articles
  • E.g. in national and regional newspapers
• Teagasc newsletters
  • Posted out to 45,000 Teagasc clients
• Press releases
• Adverts – national and local
• Diary notices in national newspapers
• Radio interviews

Digital media

• Teagasc’s forestry website
• Teagasc Forestry e-News
• Social media: Twitter, Facebook
• Text messaging – Teagasc and Forest Service
How they heard about the event

- Personal Invitation Letter: 26%
- Teagasc Text: 23%
- Teagasc e-Newsletter: 11%
- National Press: 8%
- Local Press: 8%
- Teagasc Client Newsletter: 7%
- Word of Mouth: 4%
- Other (FRS/College/Email): 4%
- Radio: 4%
- Website: 3%
- Department Text: 2%
- Twitter/Facebook: 0%
- Poster: 0%
<table>
<thead>
<tr>
<th>Notified of event by</th>
<th>Letterkenny</th>
<th>Ennis</th>
<th>Tralee</th>
<th>Total</th>
</tr>
</thead>
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<tr>
<td>Personal Invitation Letter</td>
<td>24</td>
<td>35</td>
<td>38</td>
<td>97</td>
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<tr>
<td>National Press</td>
<td>10</td>
<td>13</td>
<td>8</td>
<td>31</td>
</tr>
<tr>
<td>Local Press</td>
<td>7</td>
<td>41</td>
<td>11</td>
<td>69</td>
</tr>
<tr>
<td>Website</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Teagasc Text</td>
<td>32</td>
<td>25</td>
<td>30</td>
<td>87</td>
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<tr>
<td>Department Text</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Poster</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
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<tr>
<td>Radio</td>
<td>9</td>
<td>3</td>
<td>3</td>
<td>15</td>
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<tr>
<td>Teagasc e-Newsletter</td>
<td>8</td>
<td>16</td>
<td>17</td>
<td>41</td>
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<tr>
<td>Teagasc Client Newsletter</td>
<td>4</td>
<td>8</td>
<td>13</td>
<td>25</td>
</tr>
<tr>
<td>Twitter/Facebook</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Word of Mouth</td>
<td>6</td>
<td>5</td>
<td>6</td>
<td>17</td>
</tr>
<tr>
<td>Other (FRS/College/Email)</td>
<td>8</td>
<td>4</td>
<td>4</td>
<td>16</td>
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<tr>
<td>Programme</td>
<td>Time</td>
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<td>------------------------------------------------</td>
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<tr>
<td>Registration &amp; Networking</td>
<td>9.30</td>
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<tr>
<td>Outdoor Presentation on Log Quality</td>
<td>10.00</td>
<td></td>
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<tr>
<td>Clive Stoddart, Supply Manager Balcas</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Coffee and Networking</td>
<td>10.45</td>
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<tr>
<td>Chairperson – Dr. Nuala Ní Fhlatharta, Teagasc</td>
<td>11.30</td>
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<tr>
<td>Opening Address</td>
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<tr>
<td>Ben Wilkinson, Teagasc Area Manager</td>
<td></td>
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<tr>
<td>Optimising Forest Management – getting the most from your forest</td>
<td>11.45</td>
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<tr>
<td>Steven Meyen, Forestry Adviser, Teagasc</td>
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</tr>
</tbody>
</table>

- Accountability,
- Build networks,
- Inform of related events (letter/text),
- Sign up for e-newsletter
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Speaker/Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.00</td>
<td>Forest Regulations and Support Schemes</td>
<td>Martin Regan, Forest Service (Department of Agriculture, Food and the Marine)</td>
</tr>
<tr>
<td>12.15</td>
<td>Forestry Taxation</td>
<td>Declan McEvoy, Head of Tax, IFAC Accounts</td>
</tr>
<tr>
<td>12.30</td>
<td>Inishowen Forestry Owner Group</td>
<td>William Callaghan, Clonmany, Inishowen</td>
</tr>
<tr>
<td>12.45</td>
<td>Questions and Answers</td>
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<tr>
<td>13.15</td>
<td>Close Conference</td>
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<tr>
<td>13.20 – 14.30</td>
<td>Networking</td>
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</table>
Talking Timber
2016

Need to adapt events to local/current issues
### Forest cover 2014

<table>
<thead>
<tr>
<th>Land use category</th>
<th>Area (ha)</th>
<th>% of total land area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forest</td>
<td>653,980</td>
<td>9.5</td>
</tr>
<tr>
<td>Forest open area</td>
<td>77,672</td>
<td>1.0</td>
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<tr>
<td>Total</td>
<td>731,652</td>
<td>10.5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>County</th>
<th>Area (ha)</th>
<th>% forest in county</th>
<th>% owned privately</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donegal</td>
<td>56,345</td>
<td>11.6</td>
<td>53.1</td>
</tr>
<tr>
<td>Clare</td>
<td>59,409</td>
<td>16.4</td>
<td>36.7</td>
</tr>
<tr>
<td>Kerry</td>
<td>53,175</td>
<td>11.2</td>
<td>61.9</td>
</tr>
</tbody>
</table>

Source: Forest Service NFI, 2012
Sawmill distribution in Ireland

5 Large and 4 medium-size companies form the core (90%) of the sawmilling industry in Ireland.

3 Mills manufacture panel-board from wood fibre.

Economics of harvesting becomes more challenging as you move outside the 50 km radius.
Challenges

Preliminary wind zone map of Ireland (Miller, 1986)

Marine Irish Digital atlas
www.mida.ucc.ie

Preliminary wind zone map of Ireland (Miller, 1986) 1:2 326 000
Managing the Forest – what are the options?

1. Inspection paths
2. Measure
3. licence
4. roading
5. market

Continuous forest cover

What is the best option for your forest? Information is key
- main objectives?
- inventory
- proximity to market/timber price
- ground conditions
- exposure
- environmental restrictions

Timing is critical!

No thin?

or

clear fell and replant

or

first thin

second thin

third thin

clear fell and replant

or

Continuous forest cover
Teagasc Research adds value to events

- Thinning reduces the rotation length for highly productive plantations—30 years (thinned) versus 36 years (unthinned)

- Rotation volumes to 0.8 m³ possible after 28 years (YC 26-34)

- Thinning increases profitability ~30% plus versus no thinning (> YC 14)

- Unthinned stands have sig. longer rotation lengths to product size (increased windthrow risk)

- The impact of shorter rotations on timber quality and sawing outturn is currently being researched
Talking Timber 2016 – the outdoor event
Talking Timber – Trade stands and networking opportunities
Evaluation

Evaluation form provided with pack at registration
Immediate post-event evaluation
Analysis
  • Feedback important
Used to adapt events in subsequent years and to ensure continued relevance of our events e.g.
  • Need better sound system (especially outdoors)
  • Need more timber buyers in attendance
  • Provide more networking opportunities
  • Have more discussion/information on timber prices
  • More information on taxation – and how to be tax efficient
  • Keep to time!
Valuable to give our funders and other stakeholders a measure of the impact of our work
### TALKING TIMBER 2016

Wednesday 7 September, Radisson Blu Hotel, Letterkenny, Co Donegal

#### County of residence:

1. **How relevant do you think the theme of today’s event was**

<table>
<thead>
<tr>
<th>Not Relevant</th>
<th>Quite Relevant</th>
<th>Very Relevant</th>
<th>Highly Relevant</th>
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</thead>
</table>

2. **Please rate the following aspects of the event**

<table>
<thead>
<tr>
<th></th>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
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</thead>
<tbody>
<tr>
<td>Venue</td>
<td></td>
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<tr>
<td>Demonstration on Log Quality</td>
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<tr>
<td>Presentations</td>
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</tr>
<tr>
<td>Duration</td>
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<tr>
<td>Content</td>
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<tr>
<td>Relevance</td>
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<tr>
<td>Opportunity for questions</td>
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<tr>
<td>Trade Stands</td>
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<tr>
<td>Networking Opportunities</td>
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<tr>
<td>Event Duration</td>
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</table>
1. How do you rate today’s event?

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
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<th>Excellent</th>
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2. Overall comments on the event?

_________________________________________________________________

_________________________________________________________________

_________________________________________________________________

3. How can we improve this or other events for the future?

□ ________________________________________________________________

_________________________________________________________________

The Irish Agriculture and Food Development Authority
Relevance of the Event

**Donegal’16**
- Not relevant: 57%
- Quite relevant: 38%
- Very relevant: 5%
- Highly relevant: 3%

**Clare’16**
- Not relevant: 51%
- Quite relevant: 4%
- Very relevant: 8%
- Highly relevant: 44%

**Kilkenny’14**
- Not relevant: 34%
- Quite relevant: 13%
- Very relevant: 28%
- Highly relevant: 25%

**Westmeath’14**
- Not relevant: 46%
- Quite relevant: 8%
- Very relevant: 8%
- Highly relevant: 25%
Rating of Specific Event Aspects - Ennis

- Venue
- Demo on Log Quality
- Presentations - Duration
- Presentations - Content
- Presentations - Relevance
- Presentations - Opportunity for Questions
- Trade Stands
- Networking Opportunities
- Event Duration

Categories:
- Poor
- Fair
- Good
- Very Good
- Excellent
Overall Event Rating 2016 and 2014

Donegal:
- Poor: 3%
- Fair: 46%
- Good: 51%
- Very good: 22%
- Excellent: 2%

Ennis:
- Poor: 32%
- Fair: 46%
- Good: 22%
- Very good: 46%
- Excellent: 57%

Kilkenny:
- Poor: 3%
- Fair: 37%
- Good: 19%
- Very good: 41%
- Excellent: 2%

Westmeath:
- Poor: 24%
- Fair: 17%
- Good: 57%
- Very good: 46%
- Excellent: 22%
Overall Comments

- Need more of these events
- Good information and useful
- Wide range of relevant issues covered
- Well worth attending
- Great to make contacts
- Good opportunity to meet relevant people
- Very useful – helpful to understand markets
- Free event appreciated
- Practical information provided
- Tough questions being asked
- More clarification on timber prices
- More information on pulpwood markets
- Some presentations poor
- Longer discussion time
- More compact event
- More environmental issues
- Broadleaves not covered
- Fine line between networking opportunity and timing
- Better viewing of exhibits – big crowd
Suggestions for Future Events

- Smaller groups for Q&A
- More frequent events with smaller groups
- Include site visit to forest or sawmill
- Have machinery demonstrations
- Show video of first thinning and harvesting with commentary
- More on local markets for e.g. fuelwood, pulpwood
- More networking opportunities
- More people present to answer questions
- Avoid poor speakers
- Allow for ‘shy’ people – ie written questions or consider IT solutions
- More food – heading into lunchtime!
- More awareness of necessity of management and inventory
- Run evening events
Conclusions

• Events are well received and creating an impact
• Generally successful and recognised as such – industry and stakeholder support to continue with the events
• Need to continue for another number of years – different locations
• May need to revisit ‘busy’ areas again after 4/5 years for new cohort
• Increased awareness among landowners of issues e.g. timber prices, volume vs weight issues – TOUGHER QUESTIONS NOW BEING ASKED
• Still a large number not attending – how to get to them?
• Get a lot of queries around events – even from non-attendees – hard to quantify
• We are having significant impact on the mobilisation of wood ……can’t please all the people ……..
• Can be difficult to ascribe a decision to one factor/event: - often a combination of factors but
• It would be interesting to do follow up survey after 6 months to 1 year to ascertain what actions have been taken as a result of these events.
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Athenry
Co. Galway
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