

Consultation Response Form

Your name: Caroline Harrison

Organisation (if applicable): Institute of Chartered Foresters

Email / telephone number: caroline.harrison@charteredforesters.org.uk
0131 202 8483 (direct) 07500 927482 (mobile)

Your address: ICF Head Office, Argyle House, 3 Lady Lawson Street,
Edinburgh, EH3 9DR

About the Institute of Chartered Foresters

The Institute of Chartered Foresters (ICF) is the Royal Chartered body for foresters and arboriculturists in the UK. We have 2,300 members (250 of which are in Wales) who practice forestry, arboriculture and related disciplines in the private and third sectors, central and local government, research institutions, universities and colleges throughout the UK.

The Institute regulates standards of entry to the profession. It provides support to its members, guidance to professionals in other sectors, information to the general public, and educational advice and training to students and tree professionals seeking to develop their careers in the forestry and arboriculture industry. Chartered foresters, working with farmers across the country, are already demonstrably helping to improve delivery of society's goals, and we want to do more.

The Institute has been actively engaged with NRW for some years on the skills agenda for the sector, providing training, whether through direct courses we have run, training workshops provided for Focus on Forestry First or Member Network CPD offerings, including our annual National Conference. Most recently we have been inputting to the development of a Skills Strategy for Wales.

The Institute is committed to working with NRW in the design and implementation of a successful Timber Industrial Strategy for Wales, supporting a flourishing sector that delivers for the economy, climate, nature and people.

Our response

We welcome the opportunity to respond to this consultation. This response has been informed by our members, but also by our mission to be a balanced and impartial voice, representing professional forestry and upholding its values of high standards, evidence-based decision making and social and environmental responsibility.

Consultation Questions

1. Increasing timber supply

How can the sustainable forest resource grown in Wales, be increased to make more timber and wood fibre available for the future?

- Bring the existing woodland of Wales back into sustainable management.
- Ensure that there is a target of at least 65% conifer in new woodland creation schemes, along with productive forests at 75%, mirroring the requirements of the UK Forestry Standard and the existing grant scheme.
- Ensure that all new woodland creation scheme applicants have advice on future management. Advisors should be members of the ICF.
- Look at how woodland establishment will be funded. Post-planting, woodland owners should be encouraged to continue good management which favours growth (and carbon storage), biodiversity and long-term resilience.
- Farm owners have little exposure to growing trees and often little understanding of the need for intervention post establishment. This has led to many farm woodlands being in poor condition and puts some at risk of failure. If farm woodland planting is to become an important element of new forest planting this ongoing relationship with owners needs to be put in place, with technical and business advice, and a commitment to be in place until at least first thinnings have been completed.
- A review of the South West Forest Programme in England, a programme that undertook substantial new planting on rural farms in North Devon and Cornwall, with an aim to support sustainable livelihoods in an area suffering from a declining farming economy, found that the sub 5ha planting schemes where amenity was the primary objective added little to the national effort to store carbon or add to the growing stock of wood products. Their size made management difficult, and they lacked the scale needed to undertake thinnings at cost. The only proviso to this was in small coupes of specialist conifer or broadleaf where the objective was to produce quality timber or in agroforestry systems where the tree element provided multiple benefits or planting schemes that ran contiguously across neighbouring land to create scale.
- Ensure that NRW have KPIs attached to the regulator for:
 - Woodland creation targets to ensure there is an incentive to deliver woodland creation
 - Target annual volume offered to the market to instil more confidence in the wood processing sector and provide continuity for the supply chain
 - Use improved planting material where possible to optimise productivity
 - Use some of the income from timber sales to encourage commercial planting

How can volumes of Welsh timber and wood fibre coming to market be increased?

- The forestry and timber using industry needs confidence and consistency of supply to sustain business and attract investment.
- Welsh Government should provide supply chain productivity funding to invest in capital items to add value to local timber, i.e. mobile sawmills, solar kilns, firewood processors, small scale forestry kit, etc.

- Most woodland owners are not actively involved in marketing the timber in their woods. Decisions about when, how and to whom timber is sold is mostly left to professional foresters working independently or employed by woodland management companies. Many, but not all, choose to sell timber standing rather than as logs at roadside. This means control of roundwood supplies largely rests with organisations involved with harvesting and marketing roundwood rather than woodland owners. The best opportunities for processing more of the potentially available roundwood in Wales is to encourage and support the existing sawmills to increase production by expanding their existing markets and improving or developing new product lines. This should increase the demand and competition for roundwood and result in increased prices for timber.
- Niche markets and small-scale production of engineered products entering the construction market could be financially viable, particularly if the company is vertically integrated, such as in design and build construction, and has technical support from a university or research organisation.
- Support for woodland infrastructure, i.e. access roads, loading bays, etc, have proven to be very successful in England for increasing the volumes of timber coming to market.
- Introduce Long-term Management Plans with long-term felling licenses to incentivise a shift to long-term management prescriptions, supported by appropriate funding.
- Aggregate data from Long Term Management Plans to improve timber forecasts across the sector.
- Find ways to alleviate bottle necks and delayed programmes within NRW, delivering timber to market.
- Allow NRW to offer long-term (3-5 years) contracts for direct production thinning to bring small roundwood to market.
- Allow NRW to implement a programme of systematic harvester forwarder first thinning that quickly and affordably increases the resilience of stands.
- Develop robust strategies for deer and grey squirrel management with clear, deliverable action plans, agreed by stakeholders.
- Introduce grants for deer and grey squirrel management, including capital grants for venison processing.

2. Increasing resilience in our forests

What actions can be taken in Wales to reduce the risks to our forests posed by climate change and pests and diseases?

- Identify what key species should be supported for productive forestry in Wales as part of a Woodland Resilience Plan for Wales.
- Support further research into how we can make productive species, i.e. Sitka spruce, Douglas fir, pinus species, coastal redwood and Japanese cedar more resilient to pest, disease and climate threats.
- Commission more research into future climate tolerant and resistant species.
- Put clear contingency plans and response teams in place to deal with pest, disease, significant windblow or forest fires.

- Allow more forestry focus within NRW. This needs to be accountable with a clear mission statement with buy-in from board level down.
- Species diversity has to be at the heart of new planting schemes to avoid the current situation with i.e. ash. In England, landowners have been pushed towards mixed broadleaf planting in many cases and have been happy to proceed largely based on the attractiveness of the grant. In Wales, future planting decisions should be informed by a more thorough description of the pros & cons of various planting types; expected ongoing costs and expected returns, more inclusive of the owners' views.

How can growers and nurseries accelerate the implementation of adaptation measures?

- Secure funding for long term tree breeding ensuring there is stable funding into a range of species. Build on the National Tree Improvement Strategy.
- Alongside Confor's Nursery Producer's Group, work with the ICF's Nurseries Special Interest Group, and academic institutions, to commission R&D and disseminate findings into adaptation measures.
- Launch a communication campaign, identifying audience and key messages.

3. Resource efficiency and circular economy

What actions could be taken in Wales to encourage reuse and recycling of wood to minimise waste?

- Continue to work in partnership with the Wood Recycling Association.
- Introduce incentives to innovate new products using post-use wood in long life products.
- Encourage R&D into long life reuse of post-use wood.

How could Wales promote innovation, to design and manufacture wood-based products with increased value, extended durability and climate resilience?

- Help create demand for such products. Without demand there will be no incentive for businesses to innovate and invest.
- Support innovation and commercialisation of new products such as wood fibre insulation.
- Create opportunities to showcase case studies of best practice of the above.
- Launch a communication campaign, identifying audience and key messages.

4. Instilling confidence in demand

What actions could be taken in Wales to increase the use of timber and wood fibre in long-term uses, such as construction?

- Stabilise the supply chain to break the above barriers.
- Promote the uses of C16 rather than C24 to encourage greater utilisation of timber by educating architects, specifiers and the greater supply chain.
- Encourage Welsh government to promote the greater use of timber and wood fibre in construction.

- Support innovation and commercialisation of new products.
- Engage insurers to overcome barriers to using timber in construction.

How can we use home-grown timber and wood fibre to maximise local supply chain opportunities?

- Encourage & promote to architects and house builders the benefits of using Welsh timber.
- Stipulate in contracts for government financed building projects to incorporate UK timber.
- Simplify public procurement contracts so that SMEs are not excluded from supplying local timber.

How can Wales better align timber supply with market demand?

- Encourage Welsh government to introduce incentives/building regulation favouring the use of biogenic material in construction materials.
- In the longer-term Wales Forest sector's opportunities for adding value are likely to be improved by offering different products and services to other regions in the UK.
- The best way for Wales to develop a long-term competitive advantage is, where possible, to:
 - maintain or expand the area of coniferous woods
 - continue to grow a diverse range of species
 - focus on growing more durable species
 - grow trees that are large and of a high quality
 - ensure there are markets for thinnings
 - promote recognition that broadleaved trees can provide quality timber as well as social and environmental benefits
 - focus broadleaved silviculture on producing potentially high value trees
 - encourage greater collaboration between forestry businesses and across the supply chain

5. Developing sector capacity

What challenges need to be addressed to improve recruitment and retention in forestry and timber industries in Wales?

- Commission an Impact Assessment of Focus on Forestry First. Understanding the positive impact of this resource could justify further funding.
- Labour Market Analysis: The Forestry Commission (FC) is considering a labour market analysis project, potentially in collaboration with Wales and Scotland. The ICF supports a joint project for greater impact.
- Government and Industry Collaboration: Promoting forestry and wood processing as vital industries in the Welsh economy and their contribution to Net Zero is essential.
- Apprenticeships and Education: Funding for degree-level courses at Bangor University could attract students. Offering incentives, such as writing off student loans for those who stay and work in Wales, similar to medical students, could be beneficial.

- Clear Recruitment Gateways: Developing and promoting clear pathways for recruitment in these sectors is crucial.

What gaps are there in forestry and timber training and skills provision in Wales?

- Upskilling the Current Workforce: Focus on enhancing the skills of Forest Works Managers and other existing roles.
- Quality Trainers: Ensure access to high-quality trainers to meet anticipated demand.
- Integration with Farming Connect: Incorporate Farming Connect or similar programmes to provide training, advice, and signposting for rural landowners.
- Post-College Drop-Off: Investigate why forestry students are moving into arboriculture, farming, and further education after college. Implement strategies to actively steer them into commercial forestry.
- Apprenticeships: While Modern Apprenticeships are mentioned, consider introducing Foundation Apprenticeships for school children who don't follow the GCSE/National 4 and 5 route, similar to the programme in Scotland.
- Promotion of Forestry Careers: Attract students by highlighting the diverse skills required in forestry, such as Circular Economy, Green Finance, Sustainability, Carbon Capture, and Net Zero targets. Many degrees offer modules covering these topics, which are valuable in the forestry sector.
- Relocation Incentives: Address relocation barriers by offering funding as an incentive for those choosing forestry as a career.

What actions are needed to support the development and adoption of new products, processes and/or technologies?

- Consistency in the industry and the opportunity to invest is needed.

Other comments:

Engaging Future Generations

- Attracting interest in the forestry sector starts in schools. The Eco-Schools programme is an excellent starting point to ensure children gain a more balanced understanding of forestry, moving beyond the simplistic message of “deforestation is bad” often emphasised in the curriculum, which tends to focus only on tropical rainforest loss.
- Resources like the virtual work experience programme, developed by the ICF and the FC on the [Springpod](#) platform, have the potential to greatly increase sector interest. However, these initiatives are costly and may not continue without further funding. Ideally, such resources would be permanently available and adapted into Welsh to maximize their impact in Wales.

Changing Sector, Changing Skills

- Forestry is evolving due to technological advances, climate change, increased pest and disease pressures, and new approaches to woodland management. These changes require new skill sets, yet the sector faces challenges such as an ageing workforce resistant to change, insufficient investment in career pathways, and a shortage of forestry-specific expertise in education and training.

Key Barriers to Progress

- To address these challenges, the sector must focus on four critical areas:
 - **Data Availability:** Reliable data is lacking on the current and future workforce, with labour market and provision intelligence reports outdated and based on limited primary sources. Accurate data is essential for understanding existing workforce issues and proactively addressing future needs.
 - **Structural Barriers:** The sector is small, fragmented, and characterised by low collaboration, making it difficult to attract and upskill employees. Many micro-businesses, operating on short-term contracts, lack the capacity or willingness to invest in training, apprenticeships, or workforce development. Additionally, the sector's lack of diversity (gender, ethnicity, age) limits the breadth of skills and perspectives available.
 - **Career Pathways and Promotion:** Career pathways are unclear, making it difficult for new entrants to understand their progression or specialisation options. Misconceptions around pay, roles, and course availability further deter interest. Promotion of entry-level roles is limited, and information about careers is dispersed, making it difficult to access opportunities.

Education and Training Provision

- **Full-time Education:** Forestry courses at all levels struggle to meet demand due to high costs, specialised equipment requirements, and the need for access to woodland training sites. A lack of qualified tutors, lecturers, and instructors further complicates course availability. Forestry content is also underrepresented in early education, such as GCSEs.
- **Work-based Learning:** Work-based learning options (apprenticeships, T-levels, Skills Bootcamps) are scarce and often treated as add-ons to other courses. Many who complete these programmes lack the necessary skills and experience for employment, while forestry contractors often lack the capacity to supervise and support new entrants.
- **CPD and Short-course Training:** Although the Forestry and Arboriculture Training Fund has recently boosted short-course training, demand remains high, and planning for future CPD needs is lacking. Critical skills such as silviculture, agroforestry, and green finance are not being delivered at the required scale.
- Addressing these barriers will be essential to future-proof the forestry sector and ensure a skilled, diverse, and adaptable workforce.

6. Underpinned by behaviour change

What actions are needed to improve public understanding of productive forestry?

- This needs to be on the agenda for politicians, society and all public organisations.
- The Welsh Government Woodland Estates are our woodlands, everyone should have a vested interest in their investment.
- Welsh Government need to say with a loud clear voice forestry is positive, good for the economy, environment and for Wales.
- There needs to be better publicity & education to the benefits of using timber with Wales, both environmentally and carbon neutrality.

Do you support the proposal to establish an Industry Leadership Group in Wales?

- Yes, it must be industry led, with members made up of the decision makers within private sector businesses, across the supply chain, including post-use wood. The ICF should also have a seat at the table alongside other industry bodies. It must be supported by the public sector.
- NRW should have at least two foresters on their board. Any barriers blocking this from happening need to be reviewed.

If yes, what contribution could it make during the implementation of the Timber Industrial Strategy?

- The Industry Leadership Groups (ILG) in England and Scotland have been instrumental in developing their respective industry and growth strategies – The National Wood Strategy and Roots to Further Growth. The focus of the ILG should be to oversee the implementation of the Timber Industrial Strategy, and its future review, against an agreed action plan.

Do you support the proposal to recruit a Chief Forester for Wales?

- Yes. The role of Chief Forester in Scotland has been very successful. In England there has been a Woodland Ambassador. Both have spear-headed promotion of the sector to Government and the public working within Scottish Forestry and the Forestry Commission.
- The successful candidate must be a Fellow of the ICF or become a Fellow on taking up the role.
- How will the Chief Forester for Wales be recruited? The ICF must form part of the interview panel. They need to be aligned to the values of the Welsh Forest and Timber Using industry and work with sector bodies such as the ICF to deliver a robust competency framework for professionalism in the sector.

If yes, what added value would the role bring to the forestry sector in Wales?

- Provide independent advice to the relevant Ministers. Promote professionalism within NRW and be responsible for maintaining and ensuring professional standards are adopted and applied in NRW. Provide feedback to the ILG.

7. What, in your opinion, would be the likely effects of the proposals on the Welsh language? We are particularly interested in any likely effects on opportunities to use the Welsh language and on not treating the Welsh language less favourably than English.

Do you think that there are opportunities to promote any positive effects?

- Forestry is a key part of the rural land sector in Wales, with many foresters speaking Welsh or learning Welsh. Green jobs in the forestry sector provide a critical mechanism in supporting the Welsh language and enabling people to stay in their rural communities.

Do you think that there are opportunities to mitigate any adverse effects?

- The Welsh Government could secure funding support the forestry sector to learn Welsh. It could also provide translation support to translate industry standards, guidance and research findings into the Welsh language.

8. In your opinion, could the proposals be formulated or changed so as to:

Have positive effects or more positive effects on using the Welsh language and on not treating the Welsh language less favourably than English; or

Mitigate any negative effects on using the Welsh language and on not treating the Welsh language less favourably than English?

- No comment.

9. We have asked a number of specific questions. If you have any related issues which we have not specifically addressed, please use this space to report them. Please enter here:

- The ICF would like to see:
 - A study undertaken into the barriers to woodland creation
 - A Land Use Strategy in Wales
 - A prompt Roadmap on how to deliver this strategy, by whom and by when: clear targets and accountability along with reviews build it
 - The inclusion of urban forestry
 - A greater inclusion of diversity