

# The Constraints and Opportunities of Managing a Commercial Forestry Portfolio in Wales

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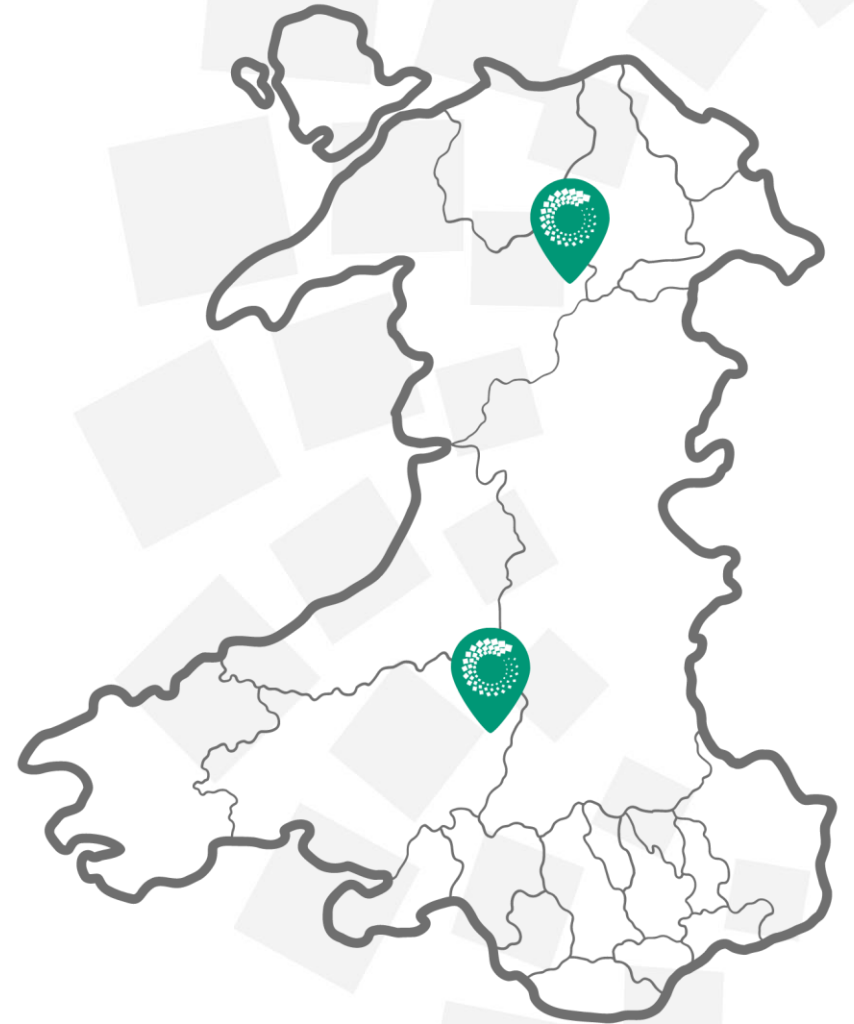


Tilhill  
Forestry

BSWGROUP member of binderholz

# Tilhill Forestry (Wales and Marches)

- Manage more than 25,000ha of commercial forestry.
- Tilhill employs 27 staff members in Wales (230 UK wide).
- 2 offices (Bala and Llandovery).
- Tilhill is part of the BSW Group, owned by binderholz.
- Tilhill is UK's leading sustainable forestry and timber harvesting company with a turnover of £240m.



# Key Business Areas



Forest Management



Woodland Creation



Timber Harvesting



Woodland Certification



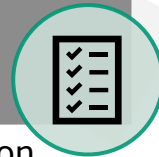
(UKWAS)



Maelor Forest Nurseries



CarbonStore



(Carbon Certification and Trading)

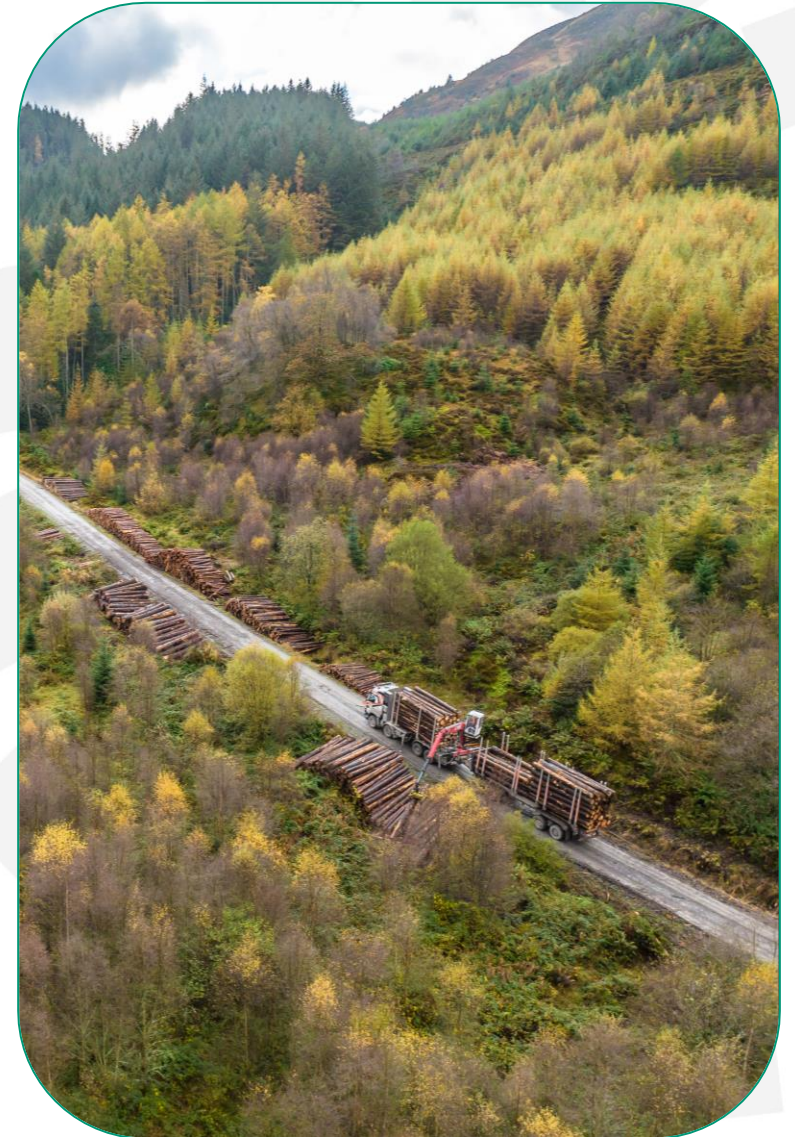
# Threats to our Business

- Pests and disease – phytophthora, red band needle blight, ash dieback etc
- Changing climate – growing conditions becoming unsuitable for some species?
- Welsh Government – regulations becoming restrictive and unworkable resulting in less woodland creation - investors may walk away.
- Failure to promote the real benefits of commercial forestry – carbon sequestration, sustainable materials, jobs, biodiversity, landscape, recreation, health, flood prevention, water quality etc
- Browsing mammals present a challenge to foresters – grey squirrel and deer.
- The lack of a skilled workforce is a challenge we face today and into the future – we need to invest in skills.
- Public perception – many outside the industry have a negative perception of harvesting trees for wood. There needs to be a campaign to educate the public about the benefits.



# Opportunities

- Global timber demand is set to quadruple by 2050.
- 80% of our timber is imported – we need to invest in woodland creation today to supply our future needs in 30-50 years. We need to act today, not next year.
- Climate change is here – we need to plant more woodlands to fight climate change and sequester carbon.
- Wales is forecasted to be a favourable place to grow timber.
- Strategic tree planting can reduce flooding.
- The value of timber is increasing.
- People value woodlands for recreation and conservation.
- Carbon is a tradable asset.
- Welsh Government want to plant more woodlands.



# What we need from WG and FR

- We need to understand and restrict the threats from pests and disease – this should be a key action for Forest Research and Welsh Government.
- We need to promote the use of home-grown timber.
- Welsh Government needs to decide what they want. **You can't have it all.** Tree planting is being squeezed between food production and biodiversity. There is very little room left. **180,00ha of new woodland by 2050 – no way! WG verified less than 700ha last year.**
- Should we be pulling back on the restrictions on tree planting to achieve this ambition?
- Should we be planting poor quality priority habitats?
- Find a solution for grey squirrels.
- We need to invest in skills.



# Thank You

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