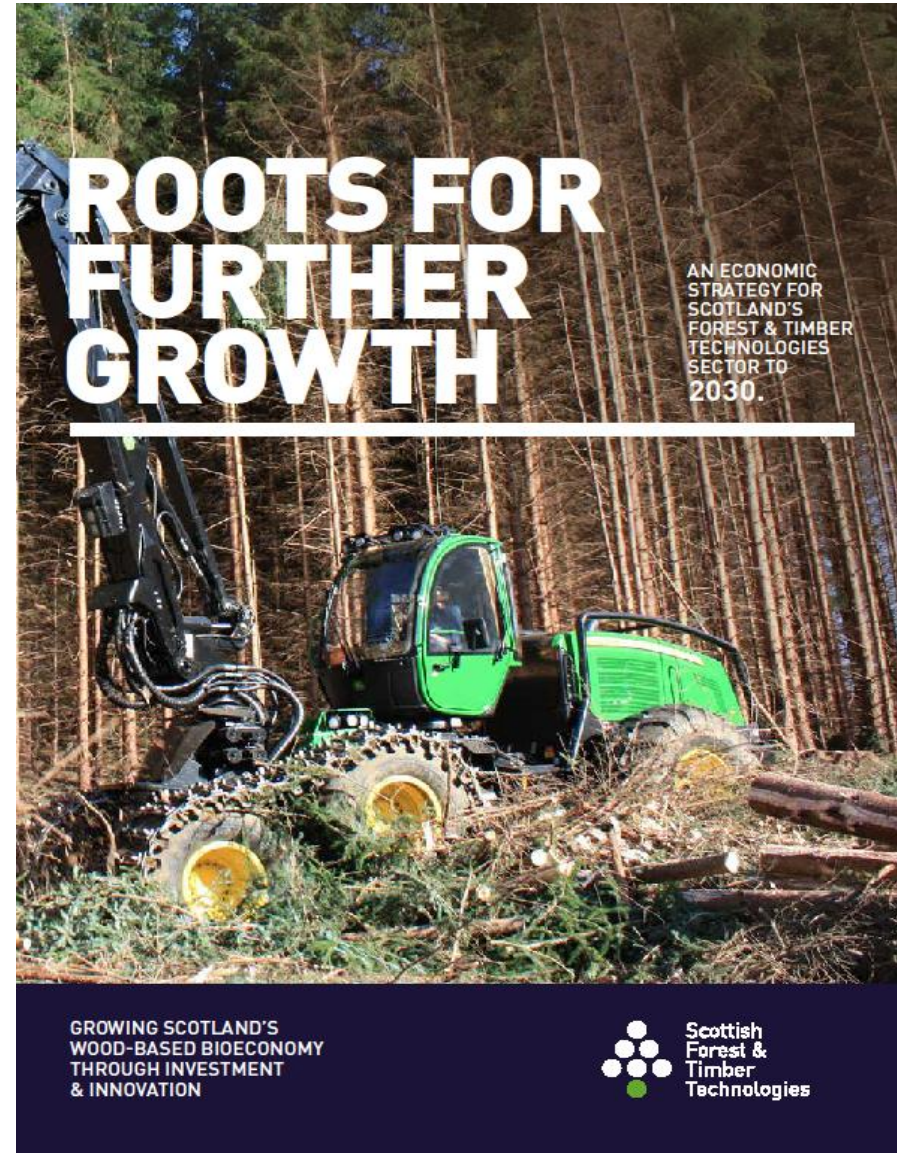


Spring 2019 Update:

Roots for Further Growth:

Andy Leitch



Strategy Group

Martin Gale, Chair and BSW/Tilhill

Guy Watt, Author

Ian Pirie, James Jones and sons

Stuart McKill, St Gobain

David Symons, Euroforest

Hugh Montgomery, Land Energy

Prof Sean Smith, Edinburgh Napier

David Sulman, UKFPA

Jamie Farquhar, Confor

Ian Archer, Industrial Biotech

George Webb, Norbord

Ian Robinson, Scottish Woodlands

John Paterson, Egger UK

Neil Sutherland, Makar Construction

Scott Shiells, Glennon Brothers

Rod Gordon, John Gordon and sons

Richard Palmer, AW Jenkinsons

Andy Leitch

Steven Hutcheon, HIE

Jason Hubert, FCS

Alistair Mckinnon, SE

Gerry McBride, SDS

Greg Walker, SG

Roots for Further Growth: GROWING SCOTLAND'S WOOD-BASED BIOECONOMY THROUGH INVESTMENT & INNOVATION



Vision

Our vision is that by 2030 we will have doubled the Scottish forest and timber technologies sector's present contributions to the sustainable low carbon growth of the Scottish economy from using virgin, reused and recycled wood fibre.

Mr Ewing “I welcome the ambition of this sector to double its economic contribution to Scotland's economy by 2030 through innovation and investment, and the publication of this strategy.”

Measures of success by 2030

A 50%
Increase in
Scottish
wood used
in
construction

50% Increase
in
Productivity

Storing
another 1
million tonnes
of CO2
through
woodland
creation

Sector GVA
to Double by
2030

Sector
Turnover
to Double
by 2030

5 Strategic Priorities for delivering the vision

ILG Strategic Priorities

Maximising the economic outputs of Scotland's forest and fibre resource.

Improving the efficiency of the wood fibre supply chain

Expanding Markets and Adding Value

Developing a Workforce with Skills for the Future

Understanding and communicating the forest and Wood-Based Industries to Scotland's Economy.

Action Plan to Deliver Strategic Priorities

- 28 industry led actions .
- Public sector support via FCS, SE, HIE and SDS; hopefully South Scotland agency in the future.
- Progress reviewed and reported on an annual basis.
- Each strategic priority will be overseen by a working group.

Strategic Priority 1: Maximise the economic outputs of Scotland's Forests and Fibre Resource

10 Actions

- The Identification and implementation of viable technologies and processes to gain a more accurate and cost-effective wood fibre availability forecast from Scotland's forests.
- Carry out a study to understand the economic and environmental outputs from various wood flows in the Scottish/UK wood supply chain to better inform wood cascading using an approach identified in the recent EU guidance on cascading woody biomass.
- Identify and develop local niche and added value markets for woodland products, and identify new markets for communities that own their own woods.

STRATEGIC PRIORITY 2: Improving the Efficiency and Safety of the Wood fibre Supply Chain

7 Actions

- Identify ways to increase wood fibre recovery from our harvesting operations through innovation, research and development work.
- Explore how we can maximise the use of data from harvester heads to significantly improve the accuracy of our forest inventory and provide accurate information on the quality of the crop harvested to growers and buyers.
- Identify and support innovation and new technologies to maximise the re-use of wood fibre along the wood supply chain and downstream industries.

STRATEGIC PRIORITY 3: Developing Markets and Adding Value

5 Actions

- Identify existing and new markets suitable for supply by Scottish grown timber and timber products through innovation, research and development, such as:
 - Manufacture and use of solid timber products and systems in Scotland.
 - Manufacture of timber rich retrofit products.
 - Designing timber deconstruction in future buildings.
 - New designs for timber rich houses/buildings for all markets.
- Work with Construction industry professionals and others to identify opportunities to increase the use of wood products in UK buildings.

STRATEGIC PRIORITY 4: Developing a Workforce with Skills for the Future

5 Actions

- Work closely with others to develop, publish, and deliver a Sector Skills strategy and action plan that focuses on four key areas; talent attraction, new entrants, developing the workforce, and curriculum review.
- Create a programme of work for SMEs in the sector in order to develop leadership skills, improve business planning and manage growth.

Strategic Priority 5: Understanding and Communicating the Forest and Wood-based Industries

5 Actions

- Support Regional industry groups to disseminate outputs and activities of the ILG, SE and FCS to a much wider range of key industry players than can be reached through general ILG meeting. To also act as a sounding board to identify strategic issues and opportunities for sector growth.
- Hold an annual sector conference/seminar reporting on progress of action plans.

Next Steps

- ILG to meet in April and agree refreshed membership.
- Mr Ewing will be co-chair.
- Set up working groups to deliver action plan.
- Agree public sector resources required to support sector deliver plan.

Skills: Modern Apprenticeships

Scottish Forest Industries Forest Machine Operators Pilot MA:

- 116 applicants; 22 asked to interview and skills test, 4 apprentices recruited (3 male, 1 female). 4 places two public and two private sector.
- Harvesting contractors involved in recruitment process.
- SRUC Barony providing formal training.
- Increased financial support via Skills Development Scotland.
- Huge collaboration between industry and public sector. Machines and ancillary equipment donated for year one.
- Considering another 4 apprenticeships to be based in Argyll.
- Next steps to look at alternative models that might attract other contractors to take on apprenticeships.

Skills cont'd

- FE Scotland recruited **8** Trees and Timber modern apprentices based in the North in the new year.
 - 175 applications; 54 selected to interview.
 - Scottish School of Forestry is formal training provider.
- Mr Ewing led Skills Summit planned for May.
 - Help ILG Skills Group to identify strategic skills issues for sector.
 - Lead to 2019-2021 ILG Skills Action plan.
 - **Any thoughts on key strategic skills issues?**

Other things of interest

- Due for publication in March “***Wood properties and uses of Scots pine in Great Britain***” Paul McLean, FR
- 2 May: Seminar on **Tree Breeding and Timber Properties** at Battleby, Perth. Organised by FR.

Timber Exhibition of RIAS Awards



Forum Timber Construction Conference

- Prestigious International conference and exhibition.
 - Germany and other parts of Europe.
 - Focusses on all that's new in timber in construction.
 - International speakers.
- Peter Wilson leading: **Edinburgh** on **9 and 10th May 2019** at the **Corn Exchange**.



Thanks for Listening