



All Ireland Roundwood Production Forecast 2011 - 2028

Henry Phillips

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Outline

Forest Sector Statistics

Area, Species, Ownership
Economic

Roundwood Production Forecast

Data sources
Basic methodology
Main results
Factors which influence supply + assumptions

Estimate of Potential Wood Energy Availability

Factors which influence availability + assumptions

Forest Sector

Area = 750,000 ha (11%)

Private = 47%

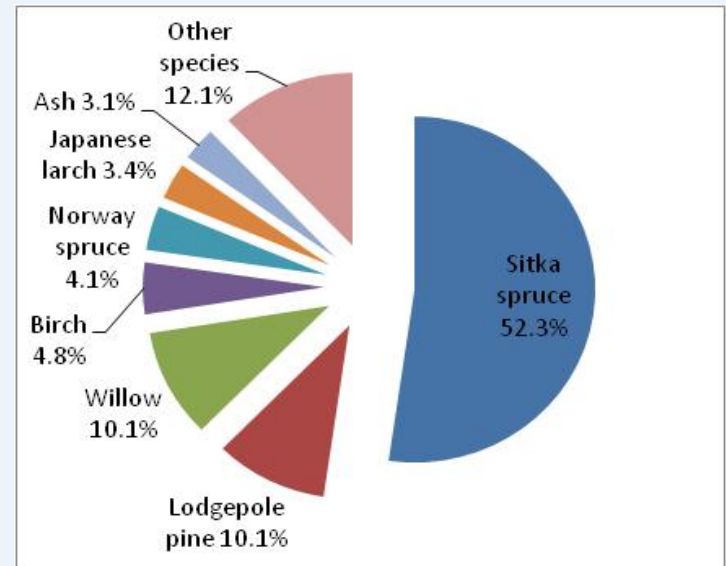
Employment = 12,000

Value to Economy = 2.2 billion

Modern Sawmilling Sector

Export Panels and Sawnwood

Provides Range of Environmental Services



Why an All Ireland Forecast?

Last All Ireland forecast was in 2001

Need to plan at an All Ireland level

Confusion regarding different sources

Data Sources

Private Sector Forecast (2009)

Modified to reflect access + harvestability

Coillte Forecast 2011

Access + protected areas

Northern Ireland Forest Service Forecast

Amended to provide standard size assortments

Forecast Volumes

All Ireland

Private sector ROI

Coillte

NIFS

Private sector NI

By Species Group

Spruces

Lodgepole Pine

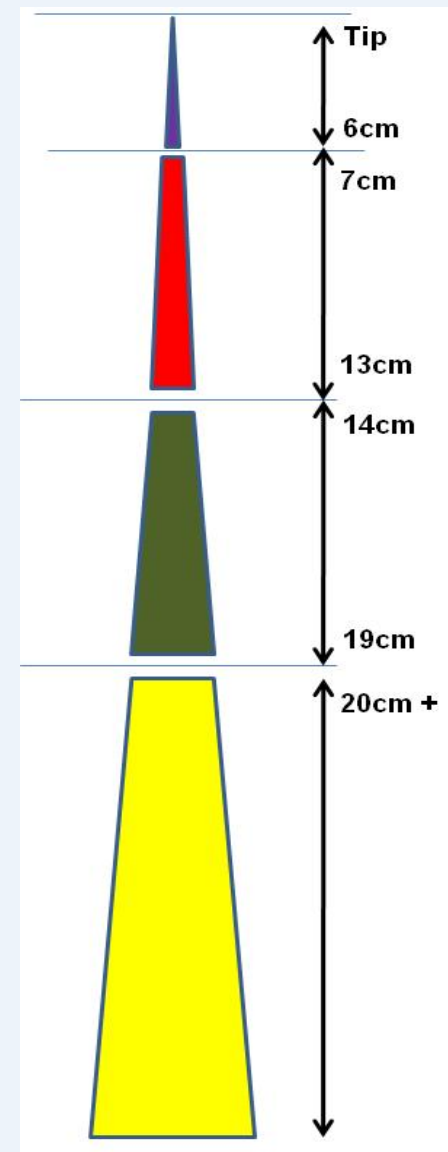
Other Conifers

By County

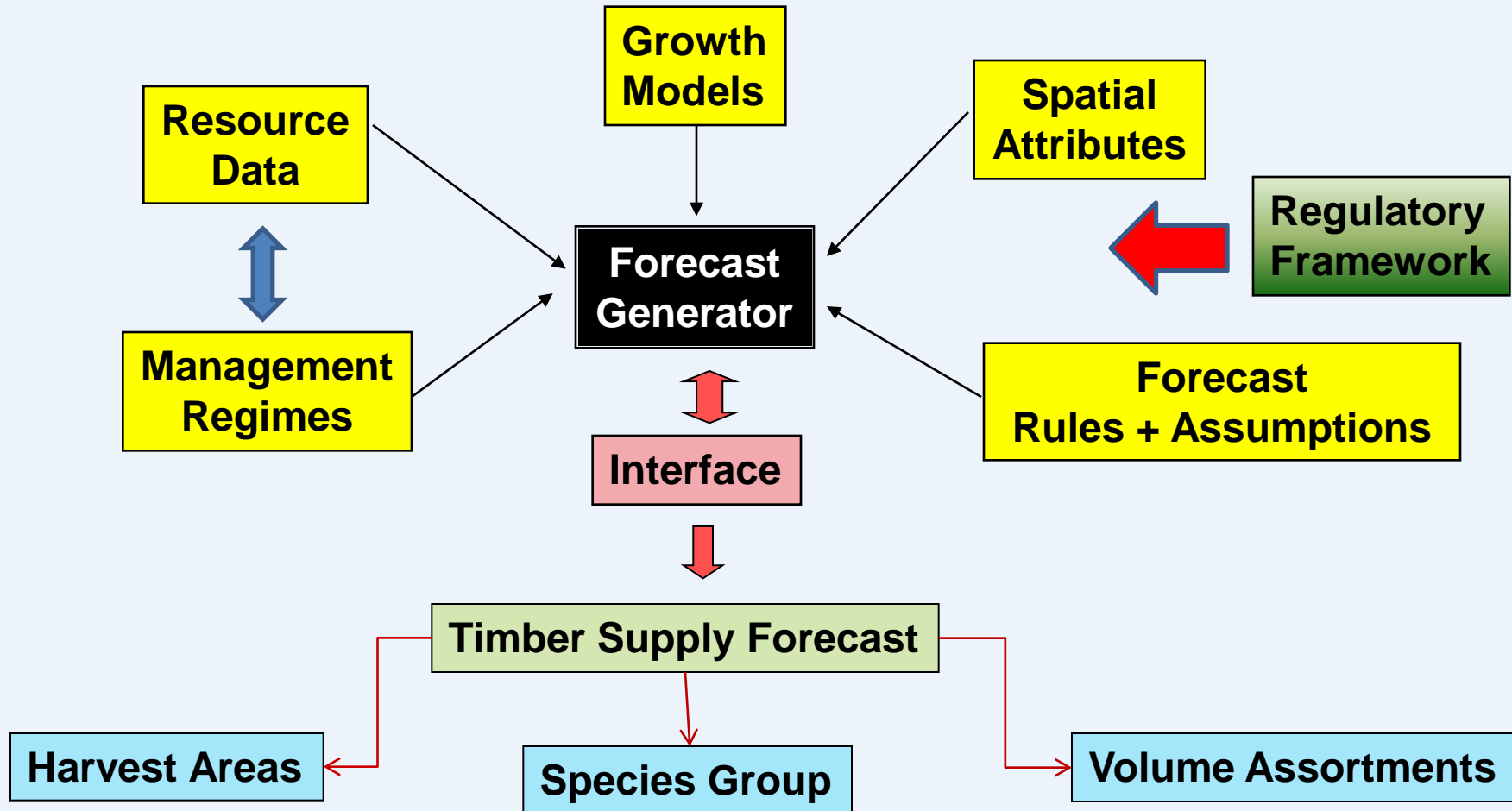
Coillte + Private ROI

By Catchment

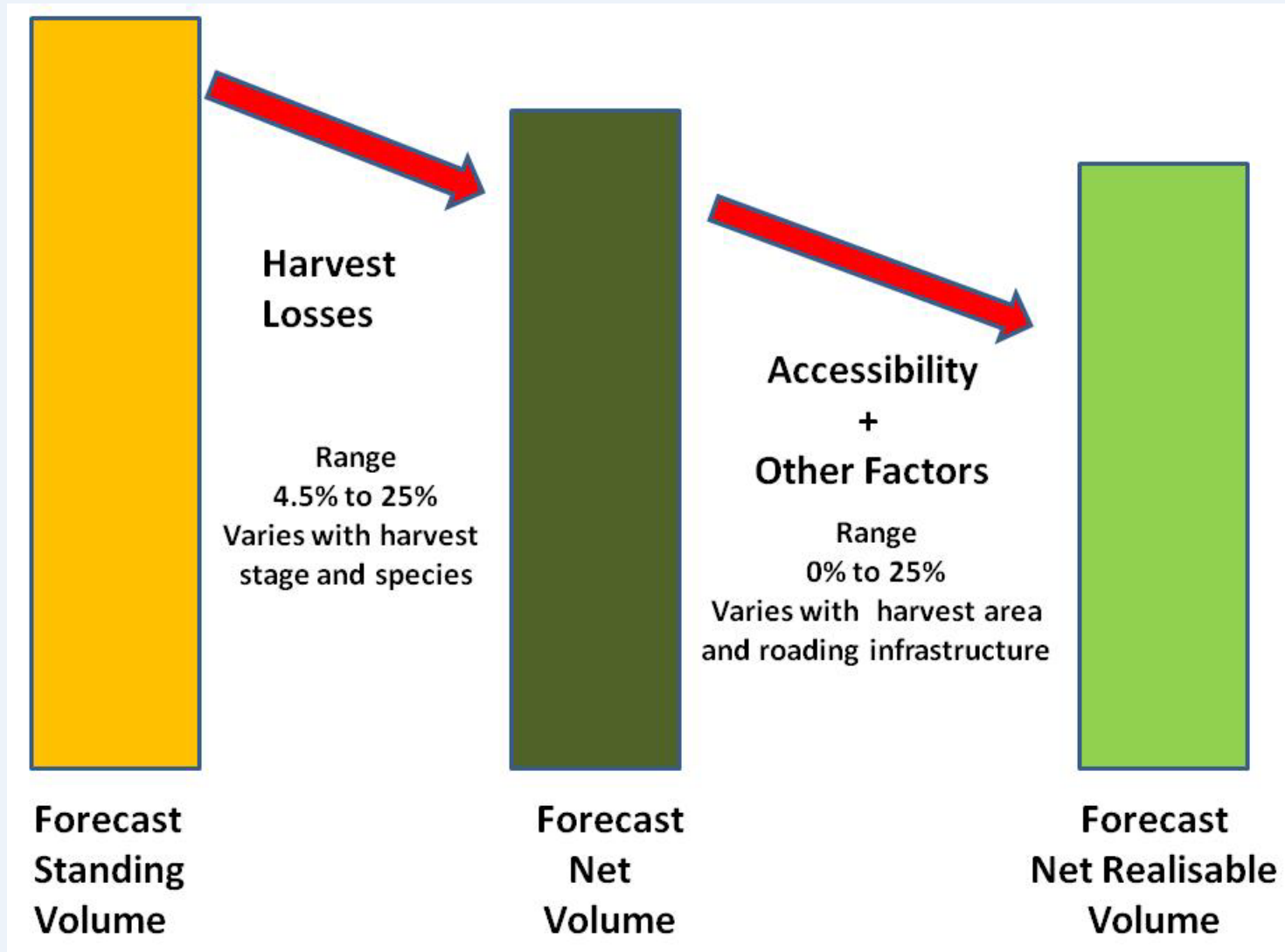
Private ROI



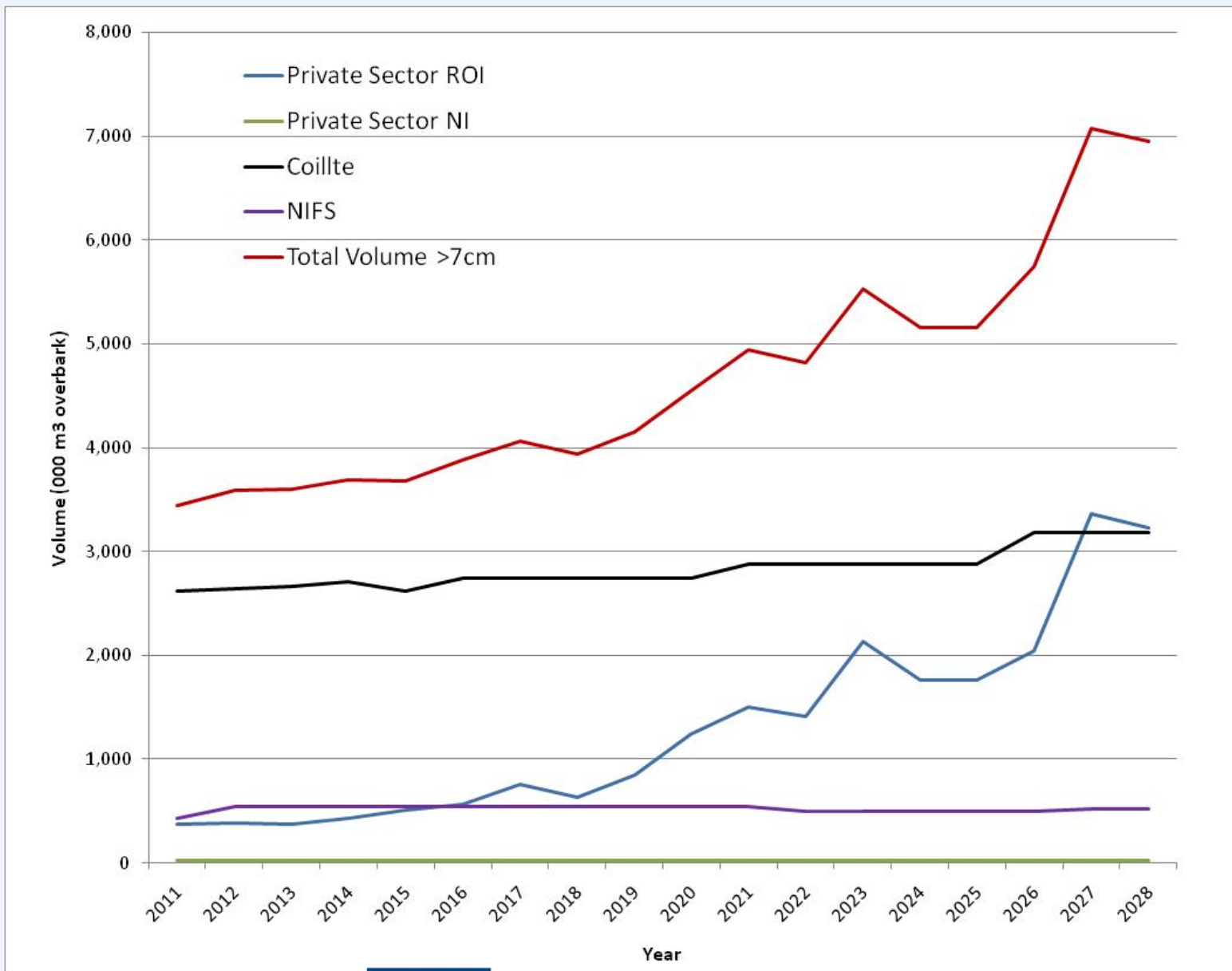
FORECAST – Basic Components



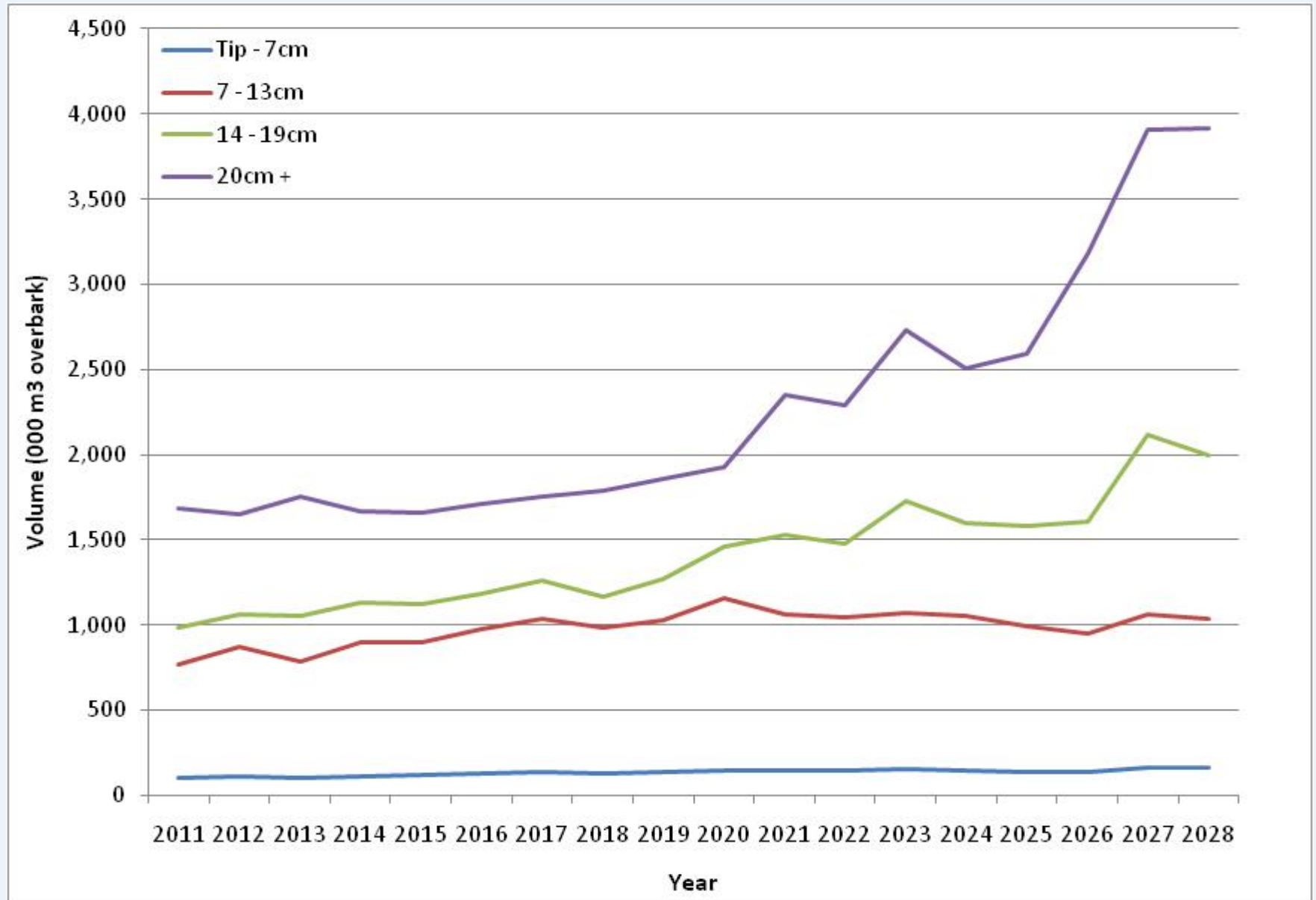
Net Realisable Volume – All Ireland



Forecast Roundwood Production (Net Realisable Volume)



Forecast by Size Assortment (Net Realisable Volume)

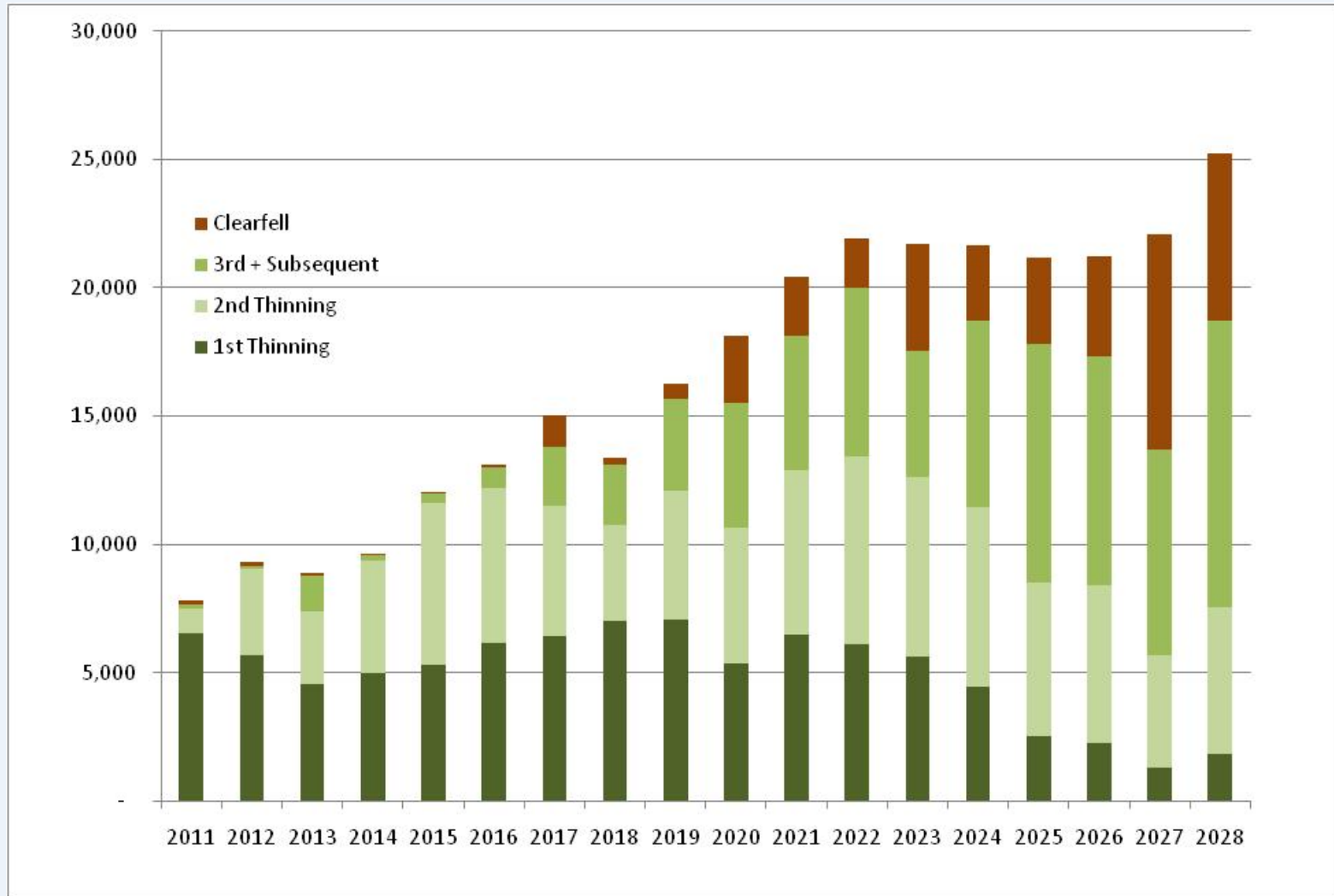


Potential Wood Supply

Factors Which Influence Supply

1. Price + Markets
2. Availability of support for road construction
3. Harvesting infrastructure
4. Owners' intentions
5. Regulatory framework (e.g. Habitats Directive , Clearfell Area)

Private Sector Harvest Areas (ROI)

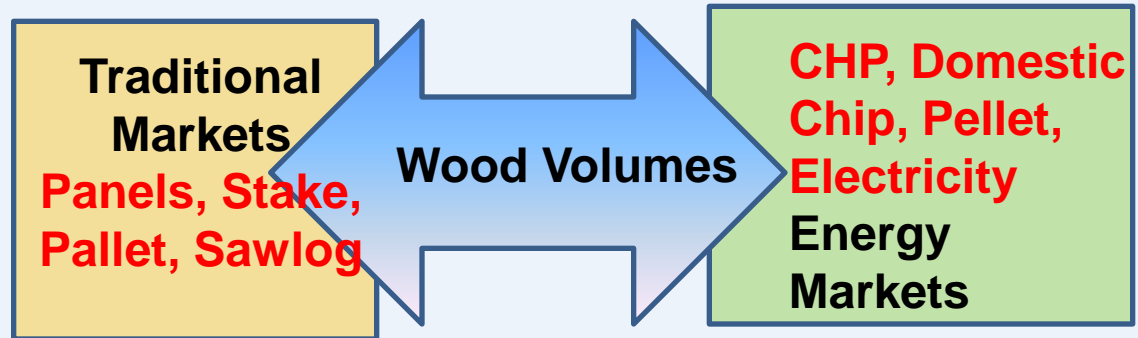


Potential Wood Energy Availability

How to Define Wood Energy Assortment

1. Forecast Volume

1. Tip – 7cm
2. 7-13cm
3. 14-19cm
4. 20+ cm



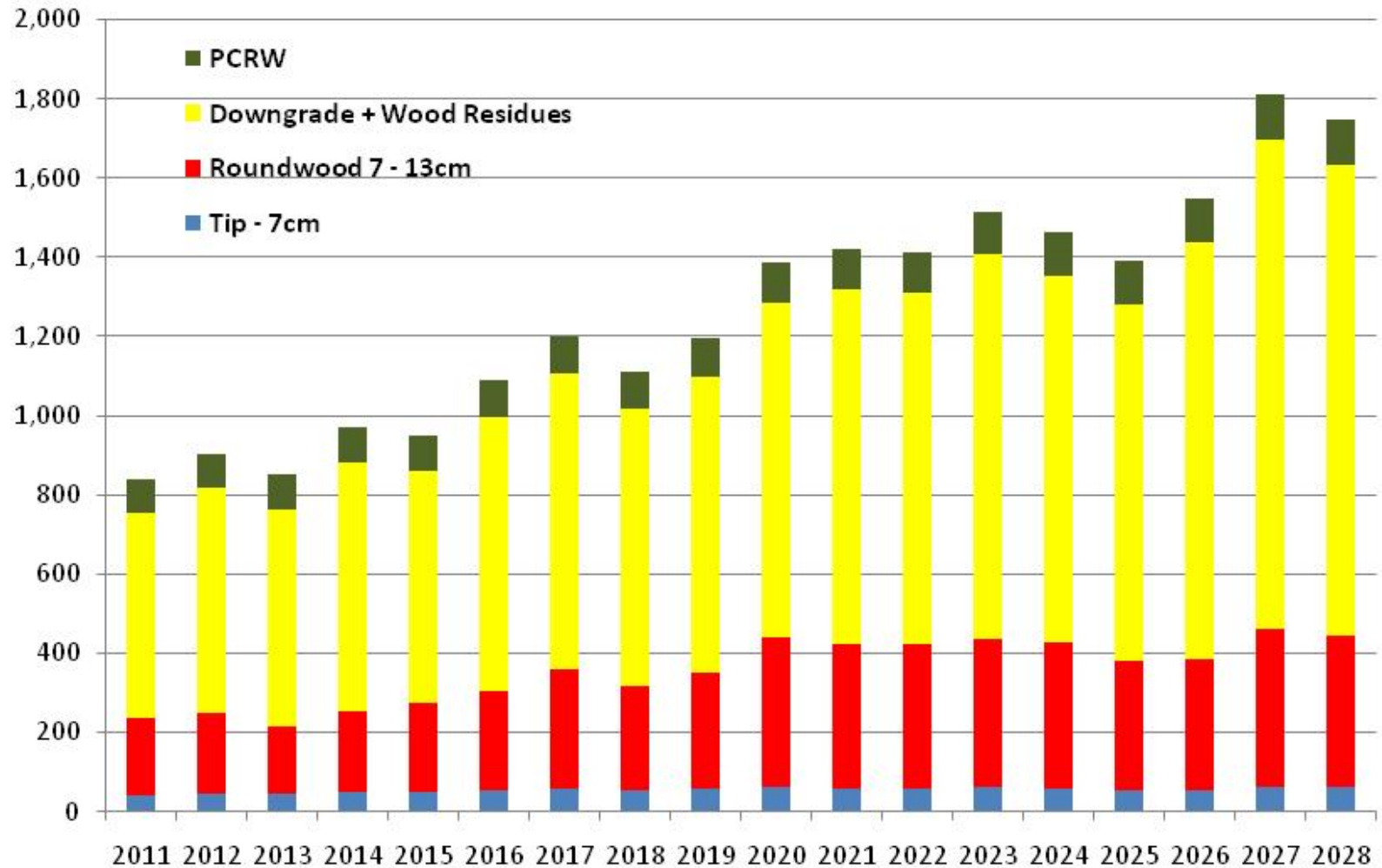
2. PCRW (Post Consumer Recovered Wood)

3. Processing Residues (Co-products – chips, sawdust, bark)

4. Harvesting lop and top

Potential Wood Energy Availability (ROI)

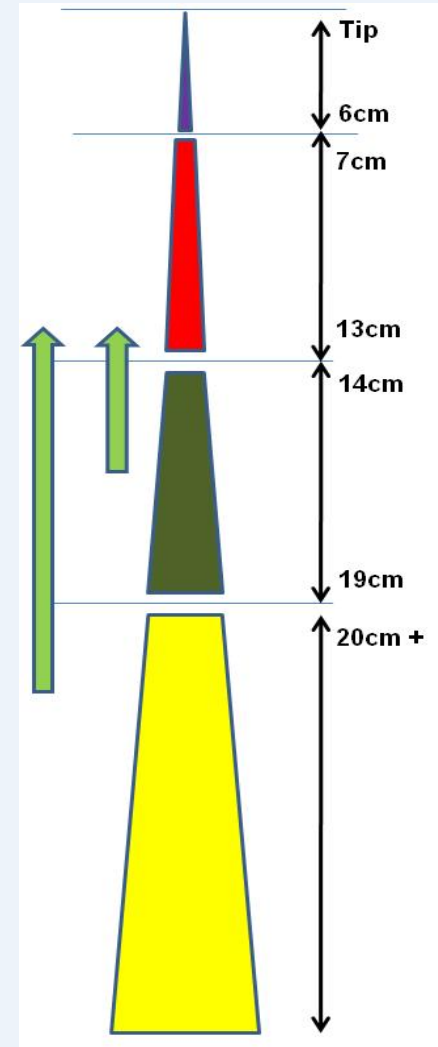
Estimated Energy Wood ('000 m3 Equivalent)



Potential Wood Energy Availability

Factors Driving Demand

1. Global Energy Prices
2. EU Renewables Energy Directive
3. Government Response and Schemes
 1. ReHeat programme
 2. Renewable Energy Feed-In Tariff (REFIT)
 3. Carbon Taxes
4. Societal Values



Concluding Remarks

- 1) Ability to forecast roundwood volumes is improving
- 2) Now have an agreed All Ireland approach
- 3) Coillte will remain the dominant supplier and user of small sized roundwood
- 4) Possible to provide “one off” forecasts on request basis
- 5) Private sector volumes will remain challenging



All Ireland Roundwood Production Forecast 2011 - 2028

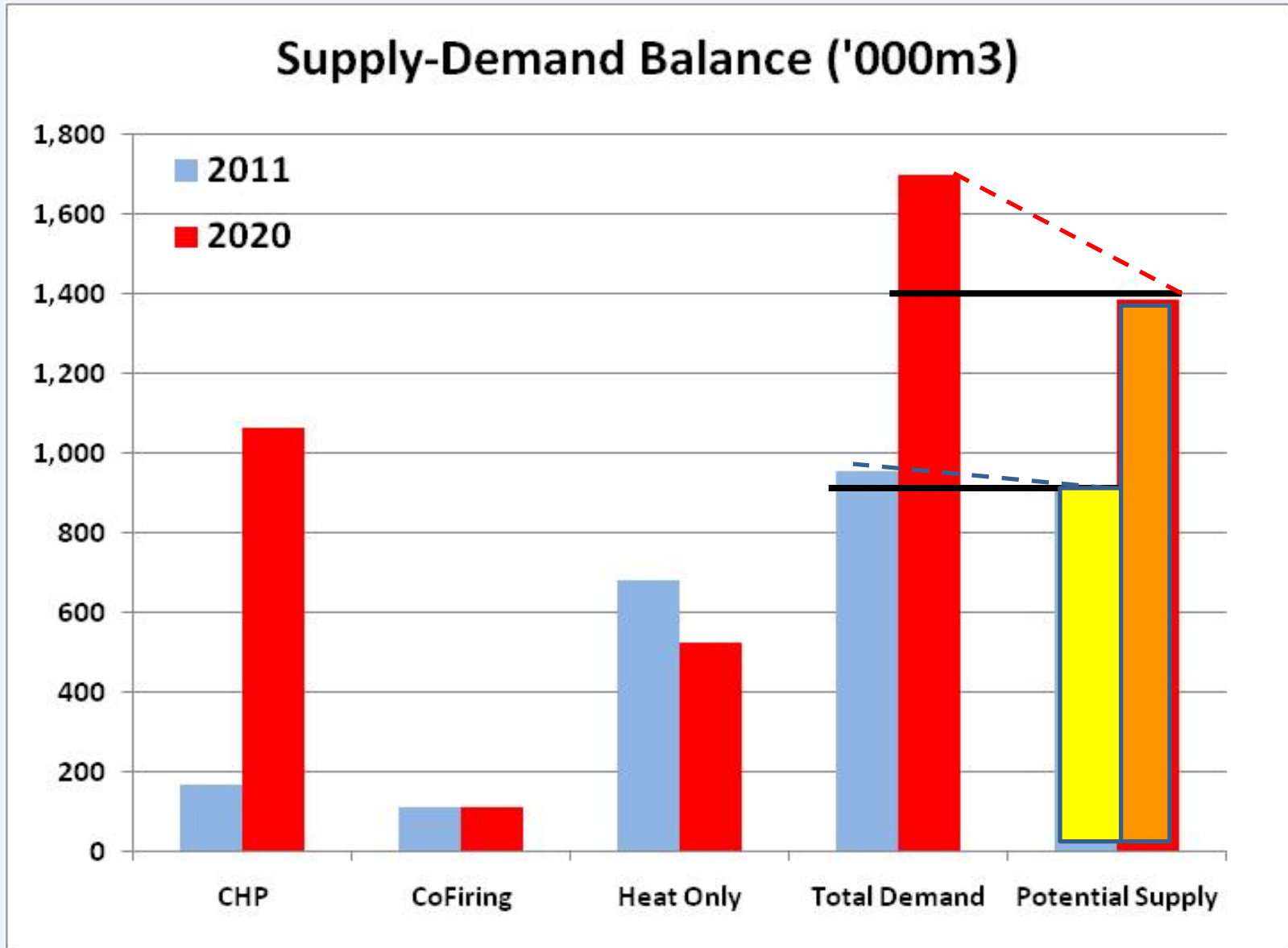
Thank You

Accessibility of Private Plantations (ROI)

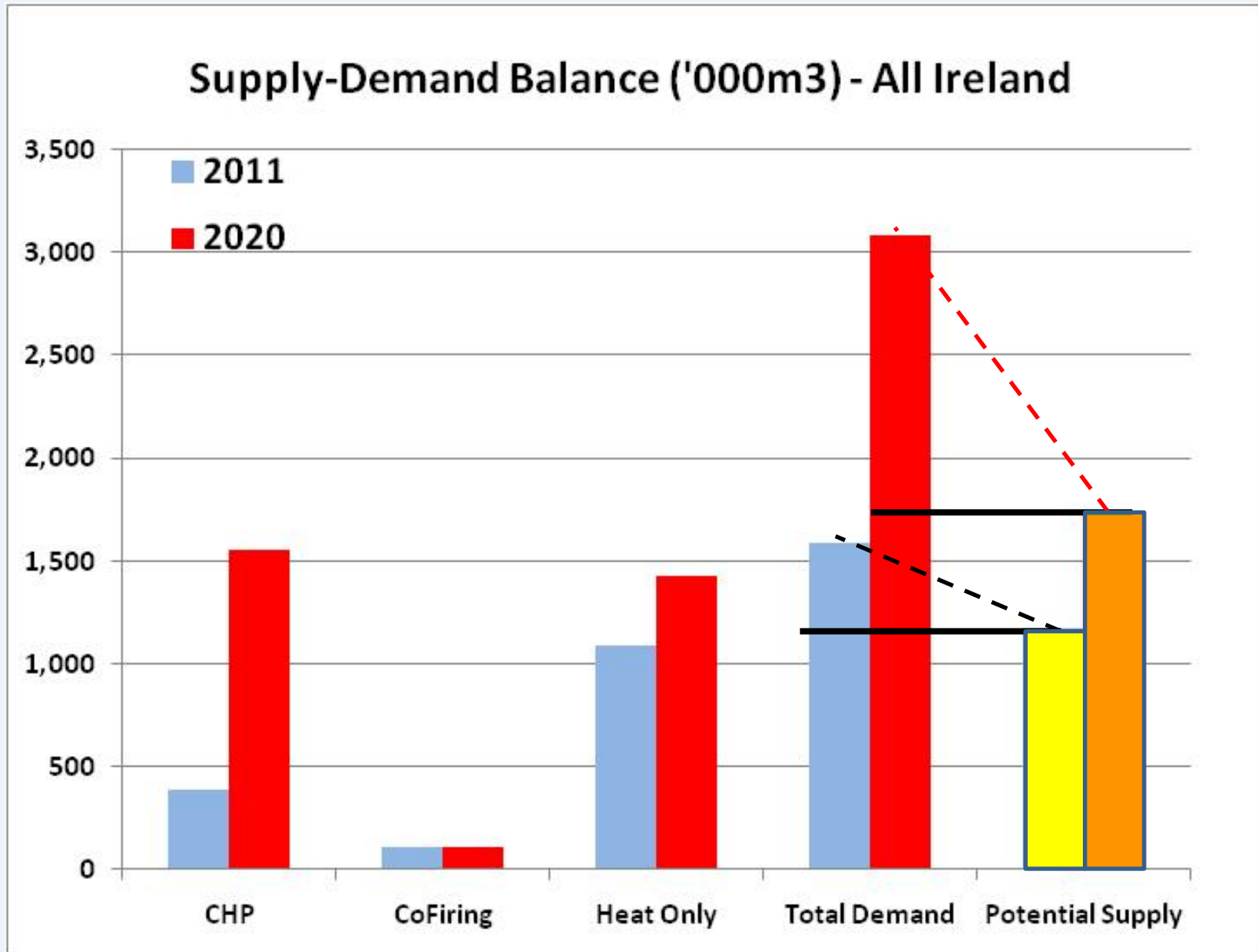
Distance to Road	National Primary	National Secondary	Regional	Third Class	Fourth Class	NA	Total	% Area
5	1,497	3,750	15,390	81,457	53,467		155,562	51.0
10	318	426	1,820	7,823	4,925		15,313	5.0
25	218	218	1,234	3,721	5,028		10,419	3.4
50	152	673	999	5,355	7,615		14,793	4.8
75	192	267	966	5,762	6,901		14,088	4.6
100	126	150	1,088	4,894	6,497		12,755	4.2
125	77	186	661	4,513	5,526		10,963	3.6
150	90	137	524	4,141	4,871		9,764	3.2
175	54	174	506	3,362	5,069		9,165	3.0
200	92	119	394	2,932	3,929		7,466	2.4
225	34	34	302	2,399	3,948		6,716	2.2
250	26	51	284	2,346	3,239		5,945	1.9
275	25	45	230	1,484	2,953		4,738	1.6
300	47	51	239	1,252	2,292		3,881	1.3
325	3	89	222	1,113	1,742		3,169	1.0
326						20,456	20,456	6.7
Total	2,952	6,372	24,859	132,554	118,000	20,456	305,192	100
% Total	1.0	2.1	8.1	43.4	38.7	6.7	100.0	



Supply – Demand Balance – Republic Only



Supply – Demand Balance (All Ireland)



Forecast Roundwood Production (Net Realisable Volume)

