

## **Draft Protection of the Environment Operations (General) Amendment (Native Forest Bio-material) Regulation 2013**

**Submission by the South East Region Conservation Alliance Inc (SERCA)**

### Attachment A

NSW wood production – long term trends

Information Working Paper

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Despite the native forest conflict, wood production in NSW has grown steadily over the past six decades. Within this trend growth, has been a marked long term structural shift away from native forest wood to plantation grown wood:

- 80% of the wood produced in NSW is now sourced from plantations.
- Sawlog production (the historical mainstay of the overall native forest sector in NSW, but with substantial regional variations) halved in volume terms over the six year period ending 2012, and is now producing at one quarter the level of the mid 1960s.
- Despite the collapse in native forest sawmilling, the NSW sawntimber industry has experienced very strong growth over the decade starting 2000, due entirely to the plantation sector.
- The more recent decline in total sawlog production in NSW reflects the Australia-wide contraction in sawn timber consumption (down 15 per cent over 2008 to 2011 (2012 data not yet available)) and the strength of the \$A against the \$NZ which saw increasing imports of dressed softwood plantation sawntimber.

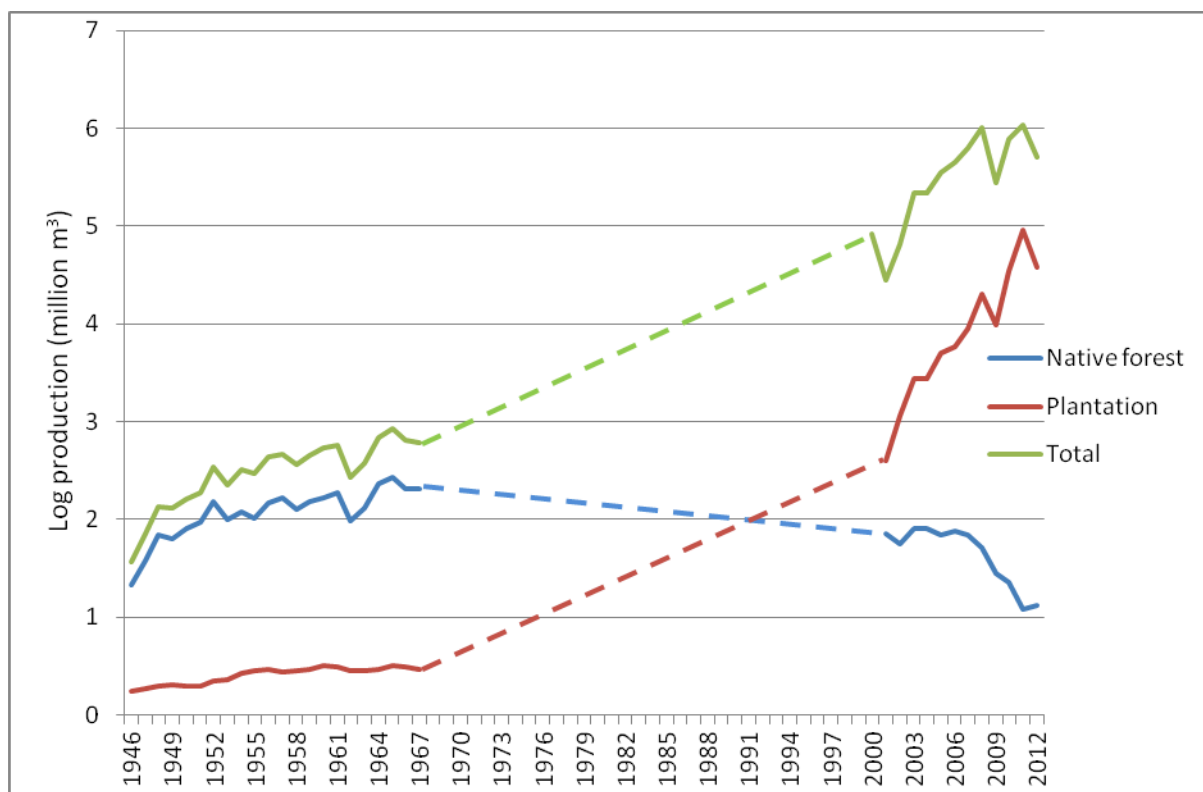
The long term trends in the production of wood (logs of all grades) and sawn timber from plantations and native forests in NSW is presented using Australian Government data published since the 1960s. The data include wood production from both the private and public sectors. Gaps exist in the data for various reasons, as indicated by the dashed lines in the figures. There are no long term data on the production of wood panels and paper in NSW, both are made mostly from plantations. NSW chip export data include varying proportions of native forest wood from Victoria and have not been reported in this paper, although its significance can be gauged from the native forest pulplog data presented in this paper. Employment data disaggregated into native forest and plantation based do not exist. This paper presents data, it does not present an analysis of the factors driving the observed trends.

Information sources:

*ABARES, Australian Forest and Wood Products Statistics (and earlier versions, Australian Forest Products Statistics, Australian Forest Resources).*

*Forestry and Timber Bureau 1969, Compendium of Australia Forest products Statistics 1935-36 to 1966-67.*

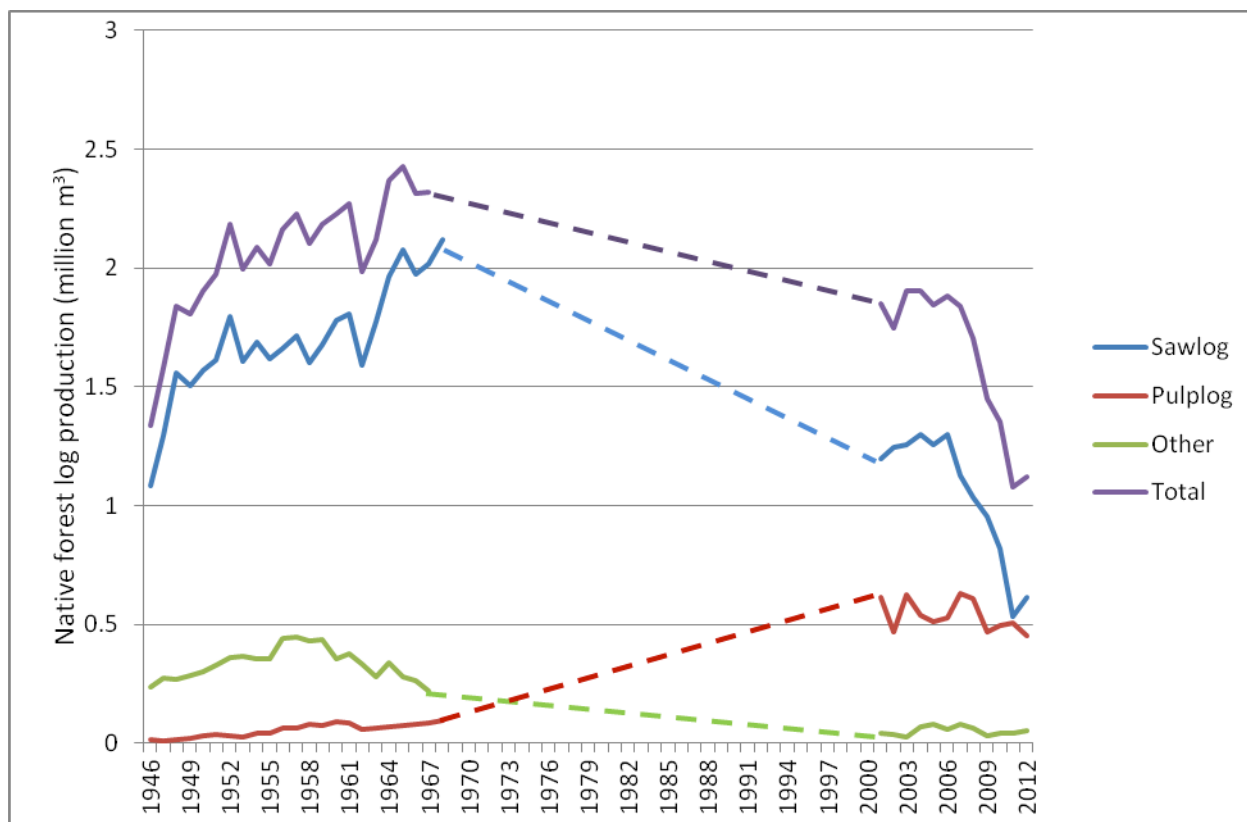
**Figure 1** Wood production in NSW 1946 to 2012 (plantation and native forest sawlogs, pulplogs and other logs from public and private sources).



Source: Forestry and Timber Bureau 1969, *Compendium of Australia Forest products Statistics 1935-36 to 1966-67*; ABARES forestry statistics. The dotted lines indicate no data available.

- In 2012, NSW produced 5.7 million m<sup>3</sup> of wood, 80 per cent from plantations.
- Wood production in NSW has grown steadily over the past six decades.
- Within this trend growth, there has been a marked long term structural shift away from native forest wood to plantation grown wood.

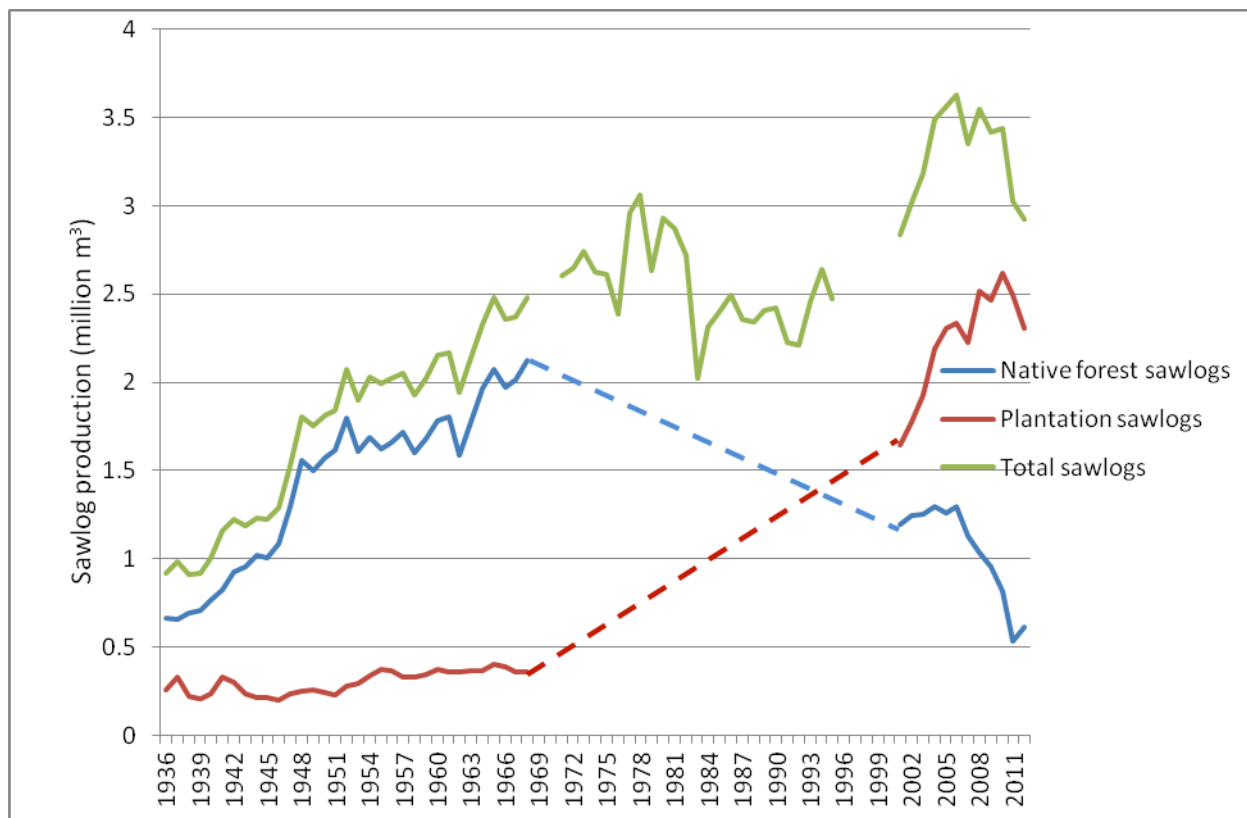
**Figure 2** Native forest wood production in NSW 1946 to 2012 (native forest sawlogs, pulplogs and other logs from public and private sources).



Source: Forestry and Timber Bureau 1969, *Compendium of Australia Forest products Statistics 1935-36 to 1966-67*; ABARES forestry statistics. The dotted lines indicate no data available.

- Until quite recently, sawlogs dominated the NSW native forest sector. (Substantial regional variations exist: for example in the Eden region, pulplogs have dominated production for many years.)
- Native forest sawlog production halved over the six year period ending 2012.
- Native forest sawlog production today is one quarter its level of the mid 1960s.

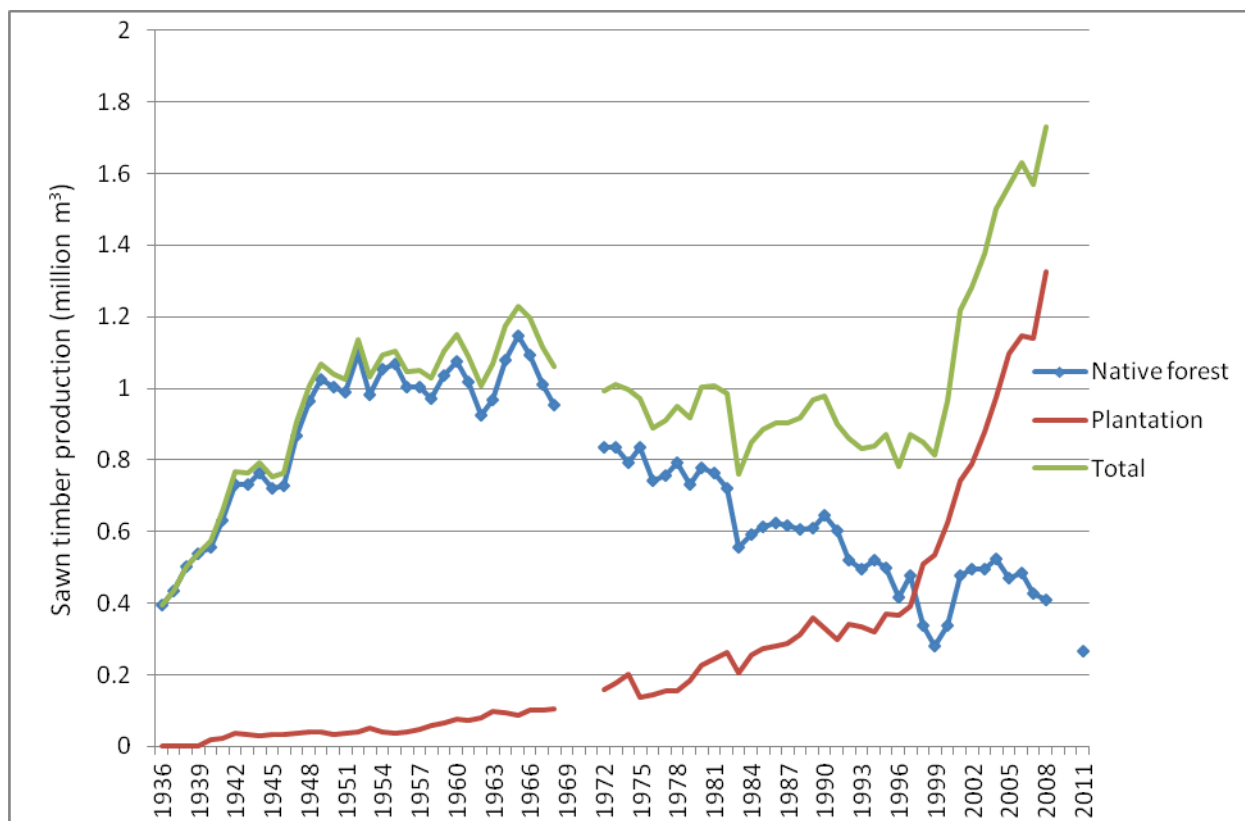
**Figure 3** Sawlog production in NSW 1936 to 2012 (plantation and native forest sawlogs and veneer logs from public and private sources).



Source: Forestry and Timber Bureau 1969, *Compendium of Australia Forest products Statistics 1935-36 to 1966-67*; ABARES forestry statistics. The dotted lines indicate no data available.

- Plantations now produce 80 per cent of NSW sawlogs.
- The long term contraction in native forest sawlog production has been more than offset by increasing plantation sawlog production.
- The more recent decline in total sawlog production in NSW reflects the Australia-wide contraction in sawn timber consumption (down 15 per cent over 2008 to 2011 (2012 data not yet available)) and the strength of the \$A against the \$NZ which saw increasing imports of dressed softwood plantation sawntimber.

**Figure 4** Sawntimber production in NSW 1936 to 2011 (plantations to 2008).



Source: Forestry and Timber Bureau 1969, *Compendium of Australia Forest products Statistics 1935-36 to 1966-67*; ABARES forestry statistics. The dotted lines indicate no data available.

Note:

- For confidentiality reasons, ABARES has reported softwood sawntimber production for NSW together with Queensland and ACT since 2008.
  - ABARES did not report native forest sawntimber production for 2009 and 2010.
  - Native forest sawntimber includes cypress pine and, in earlier years sawntimber made from rainforest species and hoop and bunya pine. Hardwood plantation sawntimber has been excluded since 2001.
  - Includes interstate sawlogs processed in NSW.
  - Plantation sawntimber includes softwood plantation sawntimber and hardwood plantation sawntimber since 2001.
- The NSW sawntimber industry has experienced a decade of very strong growth since 1999, due entirely to the plantation sector. As a result, the sawntimber industry in NSW produces substantially more sawntimber than the peak of the 1960s building boom.
  - Native forest sawntimber production continues on its long term downward trend, today accounting for around 15 per cent of the State's sawntimber production.