

# Timber industry now export led

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## Timber Team Ireland



Woodspace, the WMF stand provides the ideal exhibition space at international events such as Timber Expo show in Coventry.

The major processing mills in Ireland conduct their own market research. They are supported by Enterprise Ireland and occasionally combine to exhibit Irish timber and timber products internationally. For example, in recent years three sawmills – Glennon Brothers, the Murray Group and Graingers – have combined forces with Coillte in making a major impact at the international Timber Expo show in Coventry.

Here they exhibit in the specially designed stand commissioned by the Wood Marketing Federation (WMF), designed by Ciaran O'Connor using Sitka spruce. Hosted by Coillte, in partnership with Enterprise Ireland, the exhibition demonstrates the commitment of the Irish processing sector to the export market and their ability to come together as an effective Timber Team Ireland marketing group.

One of the most positive aspects of the Irish forestry and forest products industry has been the ability of the timber processing sector to increase export market share and to pay excellent prices for logs. When the domestic construction market collapsed in 2007, Irish timber processors were faced with a stark choice: export or die. The sector has responded positively and has now established itself as an export led industry.

Despite the domestic and global recession, and fierce international competition, timber processors continue to process all the available logs. Exports of sawn timber are now 78% of total production while wood-based panel exports have reached 87%. Ireland is now the largest exporter of medium density fibreboard (MDF), according to a recent report published by the Irish Forestry and Forest Products Association (IFFPA). Overall the total value of forest products exported from Ireland in 2011 was €308m. Over the period 2007 to 2010 Ireland's markets share of UK sawn softwood timber market grew from 4.23% to 6.34%, a 50% over that four year period.

The Irish timber processing sector comprises sawmills and panel board mills. The sawmills produce construction timber, fencing, pallets and other sawn material while panel board mills produce a range of wood engineered and reconstituted products including MDF, oriented strand board (OSB) and other reconstituted wood products.

To maintain international markets and capture new outlets, the sector has to be extremely competitive and innovative. Sawmills have had to refine and improve the quality of their sawn products. Panel board mills have developed a range of new products to convince engineers, architects and other specifiers that engineered wood can substitute for more expensive hardwoods.

One of the main challenges facing the sector is producing sufficient timber from Irish forests to meet demand from the processing sector. Approximately 2.9 million m<sup>3</sup> of logs are harvested in Irish forests annually. This level of production is insufficient and logs continue to be imported. Demand continues to outstrip supply and the position will worsen as an increasing volume of timber residue and small logs will be required for the rapidly expanding wood energy sector.

## Innovation



*Eased edged planed all over Sitka spruce.*

Irish sawn timber although sourced mainly from fast growing Sitka spruce compares favourably with slower growing species from other countries. Sawmills continue to enhance the quality by producing products such as eased edged planed all over sawn timber.

Coillte Panel Products (CPP) push the boundaries in engineered wood and have launched new OSB products including ToughPly and SiteProtect along with MDF products such as Medite Tricoya.

Medite Tricoya has been developed through the innovative ground-breaking timber acetylation techniques, which ensures that MDF is now used in applications often reserved for other materials.



*Medite Tricoya is an extremely durable board and comes with a 50-year guarantee.*

Now that 43% of all forests are privately owned, the supply from this source will continue to increase providing a major challenge for growers, forest harvesting contractors and timber processors. The average size of private plantations is 8ha, which presents additional logistical challenges as modern harvesting machinery is designed for large lots.

The role of the processing sector is crucial to the success of the Irish forestry and forest products sector. The Irish Forestry and Forest Products Association (IFFPA) estimates that for every one million euro in expenditure in the forest products sector a further €780,000 in expenditure is generated in the rest of the economy.

In its annual review, IFFPA maintains that current levels of afforestation are inadequate as “they do not meet the levels of planting which must be undertaken to achieve the national carbon sequestration levels necessary for post Kyoto reporting”.

The sector has proved that it will continue to increase exports providing the raw material is available from our forests. It makes sense to increase planting in Ireland from the current levels of less than 7,000 ha annually to at least 15,000 ha.

Apart from increasing wood supply in the long-term, a 15,000-ha annual programme will create and estimated 490 extra direct jobs annually on average over a 40-year forest rotation.

## Adding value

In recent years, timber processors have made great strides in adding value to Irish timber. The panel board sector continues to develop new products to satisfy the increasing demand of customers for more sophisticated products including long-lasting weather resistant products. Likewise, sawmills have met demands for higher quality timber. Mills now produce superior finished planed timber that satisfies high specifications in relation to moisture content, preservation and strength grading.

There is also an onus on growers to add value because wood processors require good quality logs to produce quality products. Sawmills in particular need straight, clean logs with a low knot:timber ratio. These are essential timber qualities especially for high-end construction markets.

The good silvicultural practice of removing poor quality trees in early thinning to make way for high value stems is an essential silvicultural aspect that is sometimes neglected. Maximising log volume in early thinning with little or no selection of high quality stems for the final crop is false economy and should be resisted.



*SmartPly SiteProtect a highly engineered and improved moisture resistant coated panel is designed for the most demanding hoarding applications such as in the construction of the Jubilee Gardens in London's Southbank as seen here from the London Eye.*

Pruning to produce knot-free timber in the first commercial length may be worthwhile even in fast growing crops where rotation lengths are less than 30 years. In fast growing pine plantations around the world which reach clearfell as early as 20 years, pruning is regarded as essential and begins within a few years after establishment.

Long-term tree improvement programmes to produce high quality timber through vegetative production (VP) of Sitka spruce are worth supporting. In Britain, sawmills, growers and nurseries are cooperating in a number of R&D projects exploring VP.

### **Certification**

Certification of all timber products is now a must for timber processors to demonstrate that logs have been sourced in sustainably managed forest. Certification is viewed as a marketing as well as an environmental brand. All timber sourced in Coillte, Forest Service NI and a small number of privately owned forests have certification. Growers especially with forests close to first thinning stage should seriously consider certification, ideally in group schemes to reduce costs.

Quality and affordability are essential to allow the wood processing sector to grow. If customers quite rightly demand quality timber products from timber processors, it is not unreasonable that timber processors demand quality logs from growers. To achieve this, the forestry and forest products sector needs to share a common goal and remove the disconnect that exists between grower and processor. It's in both their interests to produce quality throughout the forest industry chain to ensure that Irish timber continues to increase export market share.

### **Wood promotion to third level colleges**



*Model of the winning architectural project in the 2012 WMF 3rd Level Student Wood Awards by Fergal Rainey, University of Ulster. Home-grown spruce and Dublin calp limestone are the recommended materials.*

Wood promotion to third level colleges is a major programme by WMF. The Federation in association with Wood-ni organises the annual Third Level Student Wood Awards with participation from architectural, engineering and design student from 11 universities and institutes of technology.

The objective is to encourage and reward students who use wood as an inherent element in their projects. The awards are a partnership between the organisers and Coillte – the main sponsors – along with COFORD and the Society of Irish Foresters.



*Vessel designed by O'Donnell + Tuomey Architects from Sitka spruce sourced in Coillte forests and processed by Glennon Brothers attracted huge attention at Venice Biennale.*

### Promoting sustainable timber to a wide audience

Since the downturn in the economy, the Irish forestry and forest products sector has had to rethink its marketing and promotional strategy. While Irish timber processors target new and existing overseas customers, they are also involved in more generic marketing initiatives that promote wood at its best to a wide audience including international traders, designers, architects, engineers, students and the general public.

### Sitka spruce Vessel in Venice

Recently, Sitka spruce was featured in a number of exciting exhibitions in Venice and Ireland. Last July an articulated truck was transported by barge along the canals of Venice on its way to the Venice Biennale, the most prestigious architectural event in the world.

The timber was sourced in Coillte forests, sawn and kiln dried by Glennon Brothers and finished by Gem Construction based on a brilliant design by O'Donnell + Tuomey, Architects. Entitled *Vessel*, the original design and model for the exhibition so impressed David Chipperfield, artistic director of the Biennale that O'Donnell + Tuomey were invited to install the work in the Central Pavilion.

The full production cycle took five months including harvesting, sawing, assembly, transport and reassembly in Venice along with other aspects of the exhibition, which included Irish designed furniture and craft as well as music and literature. *Vessel*, standing over nine metres tall was a fine example of Irish creativity and craftsmanship, and excellent advertisement for Sitka spruce and the Irish forest industry.

Funding was facilitated by WMF with generous sponsorship provided by Coillte, Glennon Brothers and the Murray Timber Group. Lonza offered to treat the timber while COFORD also supported the project. The exhibition took place from August to mid November and was visited by an estimated 400,000.

*Sitka spruce transported by barge to the Venice Biennale*



## Shining a light on Sitka in Stradbally



Irish grown Sitka spruce and Douglas fir were once again the main species at the *Woodspace* exhibition at the 2012 Electric Picnic in Stradbally Hall Estate, Co. Laois.

Sawn timber from Glennon Brothers sawmill was used for the central exhibit and also for seating while 100 Douglas fir poles sourced in Coillte's forests were used as an enclosure where an estimated 30,000 people visited during the three-day event.

The exhibition including the distribution of booklets was a collaboration between the Wood Marketing Federation and Wood Collective with support from Coillte, Glennon Brothers, COFORD, Department of Agriculture, Food and the Marine, Electric Ireland and Electric Picnic.

Entitled *Woodspace*, the theme was sustainable living. Wood was deliberately sourced from a sustainably managed forests and the exhibit featured sustainable lighting.

Stradbally will be the venue for the 2013 Irish Forestry, Woodland and Bio Energy Show which takes place on Friday 10th and Saturday 11th May when all sectors of the Irish forestry and forest products sector will provide exhibitions, demonstrations and seminars.

ITGA will host a series of information sessions and seminars as they did in the 2011 show.

*Woodspace*, outdoor installation designed using sawn Sitka spruce for central exhibition and seating along with 100 Douglas poles.

The Irish Forestry, Woodland and Bio Energy Show will feature exhibitions, demonstrations (below), seminars, chainsaw skills contests, tree climbing and charcoal making.

