

# Roundwood forecast supply to increase to 7.9 million m<sup>3</sup> by 2035

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The *All Ireland Roundwood Production Forecast 2021-2040* is published by COFORD and is available through the COFORD link on the Department of Agriculture, Food and the Marine website (<http://www.coford.ie/publications/reports/>). An online tool (<https://publicapps.agriculture.gov.ie/gispublic/rpfms/pages/workspace/public.jsp>) accompanying the forecast allows users to generate their own regional forecast for an area of interest specified by the user.

*The All Ireland Roundwood Production Forecast 2021-2040* predicts the annual potential log supply, will increase from 4.7m m<sup>3</sup> in 2021 to 7.9 m m<sup>3</sup> by 2035 (Table 1) on the island. This will be followed by a small decrease to 7.6m m<sup>3</sup> up to 2040. As early as 2030, timber supply from private forests will be greater than Coillte and the Forest Service Northern Ireland combined.

The report acknowledges the uncertainties in producing a forecast to cover roundwood forecasts over two decades. Negative influencing factors on supply include storm damage, insect pest and disease infestation, fire and the possible impact of climate change.

"Since the previous forecast, the operating environment for forestry has become increasingly complex with issues around the licensing of harvesting, forest roads, afforestation and the devastating spread of ash dieback across the country," maintain the authors – Henry Phillips, Myles McDonagh, Michael Fairgrieve, Liam Malone and John Redmond. "In addition, Britain, which is Ireland's largest market for timber products, left the EU in January 2020 adding a further element of complexity to forecasting and future timber demand."

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Coillte annual production at 2.7m m<sup>3</sup> remains level to 2040 while private volume is forecast to increase to 7.58m m<sup>3</sup> during the same period.  
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Coillte annual production remains level throughout the forecast period at 2.7m m<sup>3</sup> while private annual net realisable volume (NRV) is forecast to increase from 1.47m m<sup>3</sup> to 4.43m m<sup>3</sup> by 2035 with a fall off in production to 4.18m m<sup>3</sup> by 2040. Northern Ireland log production is forecast to increase by 55% to 790,000m<sup>3</sup> over the next 15 years falling back to 700,000m<sup>3</sup> from 2035 to 2040.

The NRV forecast for Sitka and Norway spruce is 117.41m m<sup>3</sup> or 87.8% of total volumes over the forecast period. Spruce dominates as was the case in the previous forecast where it accounted for 86% of total volume. Lodgepole pine and other conifers account for 4.0% and 5.6% of total volume respectively while broadleaves account for the remaining balance of 2.6% (broadleaf volume forecast data not available for Northern Ireland).

Table 1. Log forecast of net realisable volume (NRV) by ownership category (million m<sup>3</sup> overbark and ≥7cm top diameter) for selected years.

Year	Ireland			N. Ireland	All Ireland
	Private	Coillte	Total	Mainly NI Forest Service*	Total
2021	1.47	2.76	4.23	0.51	4.74
2025	2.47	2.76	5.23	0.51	5.74
2030	3.50	2.56	6.06	0.60	6.66
2035	4.43	2.72	7.15	0.79	7.94
2040	4.18	2.70	6.88	0.70	7.58

Source: Adapted by D. Magner (2021) from All Ireland Roundwood Production Forecast 2021-2040, COFORD, Department of Agriculture, Food and the Marine. A yearly breakdown is featured in the yearbook statistic's section (page 106)

\* Approximately 95% of Northern Ireland volumes sourced in Forest Service forests.

There are major challenges in producing volumes of this magnitude, especially for private growers. Wood mobilisation will require a major improvement in felling and forest road licence approvals by the Department of Agriculture, Food and the Marine (DAFM) as well as capital expenditure in roads, harvesting machinery, transport and processing.

The authors point to consistency between the 2021 and 2061 forecast. The gross volume estimates from the 2016 forecast and the current forecasts are broadly the same over similar forecasting periods. The 2016 forecast estimated 93.4m m<sup>3</sup> compared with the current forecast of 93.7m m<sup>3</sup>. The report identifies "a number of significant changes" between this and the previous 2016 forecast including:

1. At this time, Coillte continues to fully examine the implications on future timber supply of emerging environmental and other demands on the management of its estate. Until this work is completed, Coillte will not publish an updated forecast using a revised methodological approach. As a consequence, the volume estimates for the period 2021 to 2035 are those from the previous 2016-2035 forecast. Coillte have provided forecast volume estimates for the period 2036-2040 using the same methodology as applied to the 2016 to 2035 forecast.

2. The private sector ROI forecast is now constrained on demand estimates rather than purely silvicultural / management rules as in the two previous forecasts. However, the principles of sustainable forest management are adhered to, which ensures the productive capacity of the forest estate is maintained.