Scottish Timber & Forest Technologies
Added value for Timber & Market Opportunities – What’s the Future?
Mid-Scotland
June 2011
Key Issues Affecting UK Sawmillers

- Prices
- Market Trends
- Profile
- Investments & Potential
- Future Log Supply
Direct Production - Average Unit Prices
January 2005 to April 2011

Period Ending

Green  Red  Summary

Note: When no values are shown, no figures are available for that period.
Carcassing Prices: April 2011

Source: Poyry Carcassing Index April 2011
Traditional Import Market
Upside Year

2011

2011
Changing Global Demand
Market Trends

Softwood Imports Last 4 Years by Month

BSW Timber
UK Softwood Market Share

2011 Softwood Market Share Forecast

- Imports: 39%
- UK Sawmillers: 61%
Products

Construction  Fencing  Landscape

Decking  Pallets & Packaging  Cladding
100% Utilisation

- **Chips**
  - Carton board, Pulp & Paper, Chipboard, MDF & Energy Generation

- **Sawdust**
  - Chipboard, Agricultural Bedding & Energy Generation

- **Bark**
  - Horticulture

- **Shavings**
  - Agricultural Bedding

*BSW Timber*
The customer base
Locking Away Carbon

A typical 3-bedroom semi-detached Timber Frame House, using about 6m³ of timber and wood-based products, stores about 1.2 tonnes of Carbon (equivalent to over 4 tonnes of atmospheric CO2).
Investment Overview

- BSW Timber/James Jones/Callanders
- Improving Quality & Performance
- Improving Carbon Footprint
- New/debottleknecking
- Planer Grader Lines
- Increasing Capacity
- More planed goods
- Energy

BSW Timber
So what of our wood supply?
Chart 3.6 Potential Availability & Demand for Coniferous Sawlogs in Britain to 2025
Softwood Availability: Scotland

Potential Availability (Green Tonnes)

- Small Roundwood (SRW) 7 to 16 cm td
- Sawlogs > 16 cm td

BSW Timber
Softwood Availability: Great Britain
Source: FC; Guy Watt

Potential Availability Gree Tonnes

- Small Roundwood (SRW) 7 to 16 cm td
- Sawlogs > 16 cm td

BSW Timber
GB New planting in 000’s hectares
GB Planting and Restocking 000s hectares

Conifers
Broadleaves
GB Softwood Availability to 2066
2000 forecast
BSW Timber

Thank you!