

RURAL AFFAIRS COMMITTEE: EVIDENCE SESSION ON FORESTRY

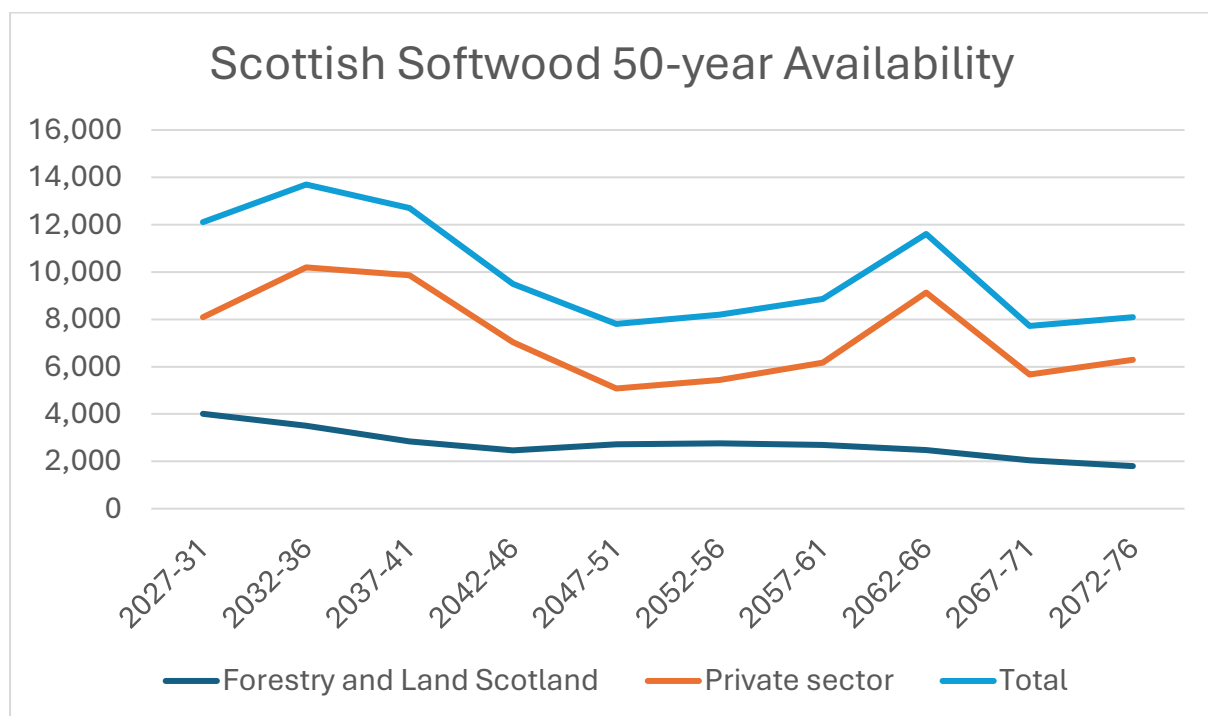
Wednesday 23 September 2026

Brief from Confor

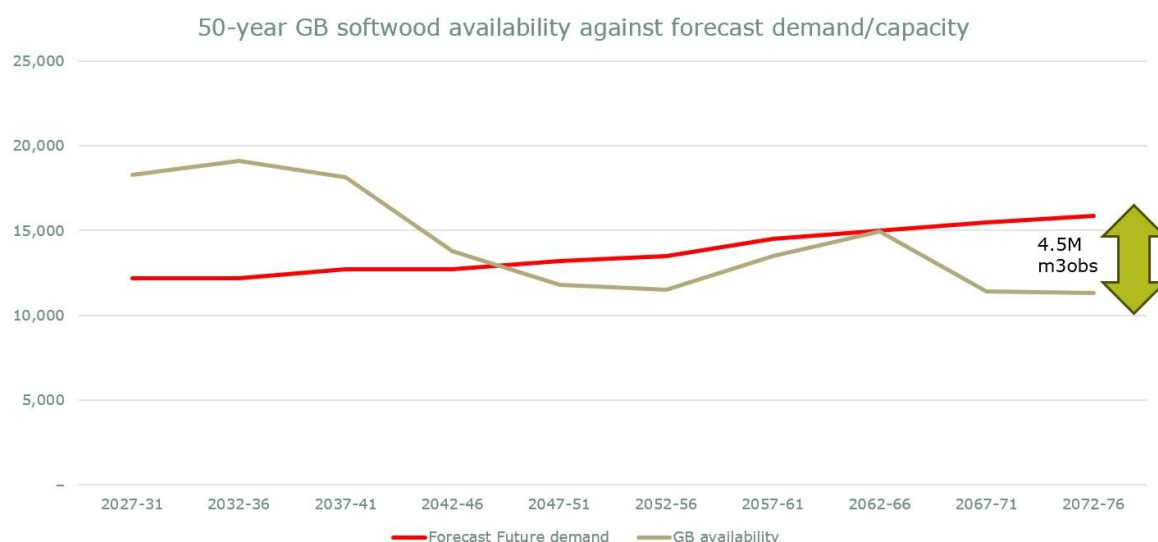
Growth or Decline in the Forestry and Wood Processing Industry?

Demand for timber is trending upwards in Scotland, the UK (a major market for Scottish timber) and globally.

Scotland's recent production forecast illuminates a linked opportunity and challenge - how can we increase the production and use of Scottish timber over the next 30-40 years while also tackling the future supply challenge arising in 40-50 years' time?



If current trends in demand for timber continue it is estimated there will be a gap between demand for timber and forecast available supply of 4.5m cubic metres of timber by 2076.



Forecast reduction in net stocked area over 50 years to 2076.

Scotland	Sitka component	Conifer component
2025	505.8	830.3
2076	368.5	673.2
Difference	-137.3	-157.1

This estimate is based on a forecast loss of over 157,000 hectares of commercial forest in the next 50 years.

If we're successful in addressing the linked opportunity and challenge, we will grow the rural economy, jobs and biodiversity and reduce carbon. If we aren't successful then we'll lose thousands of jobs and hundreds of millions of pounds of investment and risk greater windblow, wildfire and pest and disease threats and make achieving net zero much harder.

Confor is calling for action on both markets for Scottish timber and wood supply.

Given the highly regulated nature of forestry, any action has to be taken as part of a strong, forward-looking partnership between government and the sector. Such a partnership approach would also assist with key market opportunities such as housebuilding.

A major success factor will also be business confidence, and in forestry the Scottish Government can create that or erode it.

The actions

The actions need to be part of plan that has two things:

- the best strategy for avoiding a future decline in wood supply – looking at the current forest resource and the role of new woodland creation

- a strategy to instil confidence to invest that looks at promoting markets for Scottish timber and how to bring more timber to market

As an example, 92% of new Scottish homes are built with timber frame. Scottish timber is suitable, and indeed the £19m Alexander Timber Design facility at Troon uses robots to construct timber frames from Scottish timber, but generally housebuilders use imported timber due to established supply relationships, custom and software specifications. Scottish Government has the tool of 'social value' which it can use in public procurement to promote local suppliers and local materials, and industry is campaigning for specification that doesn't exclude homegrown timber – the Trust C16 campaign.

We propose that government and industry work collaboratively to support research that advances our knowledge on using timber, especially in the construction sector, and how we can utilise tree species beyond just Sitka spruce.

On wood supply we need to act now:

- achieve woodland creation targets with 60% of that wood-producing
- avoid further losses in the area of productive forest and mitigate the loss of productive forest to development
- improve tree productivity, including species beyond Sitka

Confidence is key to invest and for that the sector requires much needed certainty. In recent decades, the sector has been experiencing accelerating changes to policy, grants and forest management standards. This is undermining confidence to invest in woodland creation and wood processing, and in the businesses who undertake forest protection and management.

Forestry operates on timescales of 40-100 years yet changes to policy and management standard are being introduced before the effects of previous changes have had the chance to take effect or been properly assessed. Without effective monitoring, evaluation and learning, it is impossible to know whether new changes are necessary or whether they will result in negative unintended outcomes.

Much of this accelerating change is driven by repeated campaigning by organisations who combine narrow single-issue campaigns with unproven generic statements, eg that productive forests are bad for biodiversity – see section below.

The sector is certain that unintended consequences are happening, and confidence is in decline as people become increasingly pessimistic about the future in a sector that should be booming.

The skills challenge

Skills and new entrants will be key to both supply and markets. The industry is about to review its skills action plan. The plan is a good example of collaboration between the public and private sectors with current outputs including:

- Forestry Training Service – An industry led new company to address market failure in critical areas of technical training such as machine operator training and creating a central gateway for technical training and recruitment.
- Military Leavers taster events – a series of events co-funded by industry and public sector that introduces future military leavers to potential career destinations across Scotland's wood supply chain.
- STEM Ambassadors – Developing a growing network of forestry STEM ambassadors to engage with schools in Scotland promoting the wide breadth of career opportunities in the forest industries.

Additional investment will be required in the very near future to attract significant numbers of new recruits across the supply chain if the industry is to invest in new infrastructure to accommodate increased demand for wood products in the UK.

Biodiversity in Scotland's Forests

The story this century is one of diverging trends in Scotland's commercial forestry and protected woodland.

The latest [Scotland's Natural Capital Asset Index \(NCAI\)](#) from NatureScot reports that woodland natural capital has increased 12.9 percentage points since 2000. However, this has largely been driven by increasing woodland area and biodiversity improvements within certified commercial forests.

Woodland condition in 'protected woodland sites' is poor, decreasing by 27% relative to the 2000 baseline. Overall, 34% of such woodland were in favourable condition, 14% were recovering, and 50.7% were in unfavourable condition.

NatureScot identifies pressures on protected/native woodland, including high herbivore impacts, particularly deer, invasive species, especially rhododendron, and tree diseases affecting species including ash, elm, juniper and alder.

NatureScot also reports that native woodland planted during the preceding 25 years has generally remained in poor condition, largely because of grazing pressure.

In contrast, a recent natural capital report by SAC Consulting describes modern productive forests as multifunctional landscapes – “timber production and biodiversity are not mutually exclusive, and certification, restructuring and contemporary forest design can increase habitat diversity while maintaining a productive timber resource”.

Scotland's *National Forest Inventory Woodland Ecological Condition* assessment states that: “active management of a forest for wood production delivers higher biodiversity alongside renewable wood production”.

Scotland's wood producing forests are going through an extended period of transition that will yield further increases in biodiversity through the restructuring of forests planted last century and contemporary forest design of new forests.

Action, however, is needed in Scotland's protected native woodland to bring many more into favourable condition, including many of those woodlands that have been planted this century.

A poorly managed native woodland under severe deer pressure can be in poor ecological condition. A well-managed productive conifer forest containing broadleaves, open ground, riparian habitat, deadwood and different age classes can support considerable biodiversity.

Woodland Creation Targets

For information, and contrary to various briefings we see from campaigners, NatureScot report that since 2000 the area of broadleaved deciduous woodland has increased 61%, while coniferous woodland has increased by only 0.5%. Crucially, that conifer figure most likely masks an actual loss of productive forest area as the figure includes the increasing area of non-timber producing native pinewoods, open ground and other 'non-productive' land.

As things stand we expect to see further significant losses of wood producing conifer forest, and therefore even if we hit Government targets, a significant proportion of future new woodland will be replacing lost conifer area rather than expanding the productive capacity of our forests.

The Royal Society of Edinburgh Report

The Rural Affairs and Islands Committee in the previous Parliament took evidence from Fellows of the RSE on forestry and their report was referenced a number of times by MSPs, including in debates on new legislation.

Earlier this year, Dr Andrew Cameron from the University of Aberdeen published a critique of the report.

Dr Cameron's critique highlights that Scotland's forestry policy has to reconcile several objectives simultaneously, including climate mitigation, biodiversity, timber supply, rural economic development and jobs and resilient land use. However, in Dr Cameron's view the RSE inquiry placed carbon, biodiversity and environmental/community benefits at the centre of its assessment and did not give comparable consideration to timber production and forestry's economic role, despite these being explicit elements of Scotland's Forestry Strategy.

This resulted in the authors effectively posing the question "native woodland or productive conifers?" when the question surely should have been "how can Scotland establish and manage the appropriate mix of woodlands to deliver all the beneficial outputs that society is seeking?".

Dr Cameron also identified two overarching shortcomings in the report - weaknesses in the methodology used to reach its conclusions, and an incomplete or selective treatment of the scientific and economic evidence. These shortcomings make the report's recommendations unreliable.

This conclusion is evidenced by, amongst other things.

- *The reliance on a small, self-selecting consultation sample.* The evidence call generated 45 submissions through an open public call and targeted invitations. Dr Cameron argues that an open online consultation is vulnerable to self-selection bias and therefore should not be treated as representative evidence of wider opinion.
- *No systematic review of the scientific literature.* There is no comprehensive, balanced synthesis explaining how research was searched for, selected, assessed and weighted. 48% of references concern climate/environment whereas only 5% concern commercial forestry, and Dr Cameron argues that quantitative results, context and caveats are often missing.
- *Insufficient consideration of modern productive forestry.* Cameron argues that the report's portrayal of commercial forestry draws too heavily on historic plantation forestry and does not adequately recognise changes in forest design and management over recent decades. In particular, he says it does not properly examine biodiversity within contemporary productive forests or measures already required through modern forest-management standards.
- *An overly simplistic treatment of biodiversity and tree species.* Dr Cameron challenges what he sees as a tendency to equate native woodland with high biodiversity and non-native productive forestry with biodiversity loss. Dr Cameron cites studies reporting substantial biodiversity in non-native productive forests and argues that biodiversity depends on factors including forest scale, structure, age, species composition and management - not simply whether the principal tree species is native.
- *An incomplete carbon analysis.* Cameron argues that the carbon section is surprisingly limited and concentrates heavily on soils while insufficiently considering the sequestration rate of fast-growing productive forests, carbon retained in harvested wood products, and substitution of timber for more carbon-intensive materials such as steel and concrete. He also argues that the report does not adequately examine research on the longer-term recovery of soil carbon following afforestation.
- *Weak treatment of forestry's economic contribution.* Dr Cameron describes the timber-industry section as short and poorly evidenced and says some employment data are outdated. More fundamentally, he argues that the authors did not adequately analyse the economic and industrial consequences of reducing Scotland's future productive timber resource.

Confor, 21 September 2026