NSW Forestry Industry Roadmap

The NSW Government’s vision is that NSW will have a sustainably managed forest estate that underpins a dynamic, economically efficient forestry industry, which continues to support regional economies and delivers social and environmental benefits.
The $2.4 billion NSW and wood product manufacturing industry is an economic driver for regional NSW. The softwood plantation sector industry value is $1.92 billion and the native forestry sector industry value is $465 million.  

NSW’s population will grow by 100,500 people on average each year to 2031. Sydney’s population alone is set to increase to 5.86 million by 2031, which means more than 660,000 new homes need to be built. With timber a primary building construction material, sourcing more timber locally will be good for the environment, benefit our local industry, boost our regional economies and help keep the carbon footprint below that of building materials such as steel and concrete.  

Overall consumption of forest products in Australia has risen over the past 40 years. Consumption per capita of wood-based panel products has increased by more than 150%, while consumption per capita of paper and paperboard products has increased by about 40% over the same period.  

More than 3,300 people are employed in NSW forestry and logging, timber wholesaling and forestry support services and 18,946 people are employed in NSW paper and wood product manufacturing sectors. 42% of these jobs are based in regional NSW.  

Sustainably managed forests have the capacity to absorb greenhouse gases as they grow, which contributes to a healthy environment.  

If consumption per capita of forest products in Australia remains at 2012 levels, Australian demand for these products will increase by about 43% within the next 25 years.  

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In NSW, we rely on wood products every day. From the structures of our buildings, the furniture in our homes, the newspapers we read, to the toys our children play with, wood features in almost every aspect of our daily lives.

It’s no surprise, then, that demand for wood is healthy— and growing. Our $2.4 billion forestry industry provides critical jobs in our regions and is embedded in NSW’s social fabric, culture, and economy.

But despite its importance, the risks and threats to the NSW forestry industry have created a complex operating environment. Previous NSW Government decisions combined with years of inappropriate or underinvestment, regulatory uncertainty, cheaper imports from overseas and resource insecurity have had a domino effect, which has put significant pressure on the industry.

I am committed to getting our local forestry industry back on track and prioritising our beautiful and sustainable timber products over cheaper, imported products where environmental standards are often inferior to NSW.

It is important to have a robust NSW forestry industry because overseas imports do not always meet our rigorous environmental standards. The release of this NSW Forestry Industry Roadmap (the Roadmap) marks the beginning of the transformation process. At the heart of this whole-of-government plan is the importance of a triple bottom line approach, balancing the legitimate range of economic, social and environmental considerations.

The Roadmap is about expanding or decreasing productive native forestry areas—our state’s conservation areas and national parks will remain unchanged and protected.

The Roadmap is about transforming, reviving and re-invigorating the industry, which has lost its competitive edge. It addresses the challenges such as supply and demand issues, but it also seizing the opportunities by reducing unnecessary red tape, stimulating investment and encouraging a greater role for our timber industry in Australia’s low carbon future.

This is a fresh start for how the NSW Government manages productive forests and supports the forestry industry, and I encourage all stakeholders to participate in the consultation processes as we embark on this long-term journey of transformation.

The NSW Government’s vision is that NSW will have a sustainably managed forest estate that underpins a dynamic, economically efficient forestry industry, which continues to support regional economies and delivers social and environmental benefits.

Guiding Principles

- Forest policy decisions should recognise the legitimate range of economic, social and environmental values in the NSW forest estate and the NSW Government’s commitments under the National Forest Policy Statement.
- Policy decisions will balance long-term sustainable and reliable timber supply with the maintenance of environmental values.
- The NSW planted and native forestry estate should be managed in line with the principles of Ecologically Sustainable Forest Management, and the NSW Government commitments under current and future Regional Forest Agreements and Wood Supply Agreements.
- The forestry industry should be encouraged to participate in transformative new markets, including engineered wood products and the carbon economy.
- Data supporting forest policy decisions should be timely, reliable and transparent.
- Regulation of the forestry industry should be efficient, effective, transparent and outcomes-focused.

The NSW Government’s vision for the forestry industry supports the following four key government objectives:

1. The NSW Government’s priority to create 150,000 new jobs by 2019, of which 30,000 are in regional NSW
2. The Department of Primary Industries’ strategic objective to grow the value of the primary industries sector by 30% by 2019
3. The Environment Protection Authority’s strategic objective to maintain key native forest values, including threatened species; and to oversee modern, effective and transparent regulation of native forestry operations on public and private land
4. The NSW Government’s commitment to reform the management of the State’s biodiversity

Why has the NSW Government created the Roadmap?

The NSW forestry industry is facing a number of significant state-wide and regional challenges, including resource and regulatory uncertainty in the native forestry sector and resource uncertainty in the plantations sector.

The NSW Government has developed a clear vision and Roadmap to ensure the forestry industry is economically viable and sustainable into the future.

The NSW Government has also determined a set of guiding principles, which will be applied to decision-making in relation to forest policy and regulation in NSW, to ensure whole-of-government consistency with the Roadmap.
Why the NSW Government is committed to sustainable forest management

The NSW Government is committed to ensuring our regions have a stronger and more diverse economic base, which is critical to the overall wellbeing and resilience of our communities.

The $2.4 billion NSW forestry and wood products manufacturing industry is an important economic driver for regional NSW.

More than 22,200 people in NSW are currently employed in the forestry and wood products manufacturing sectors. This includes 3,300 in forestry and harvesting and 18,950 in paper and wood products manufacturing.

42% of these jobs are based in regional NSW. The forestry industry supports jobs in sectors such as forestry and timber harvesting, paper and wood product manufacturing, construction, logistics, trades and sales, and science and research. For many people in rural areas, including Aboriginal communities, forestry jobs are crucial in ensuring their communities’ economic diversity and sustainability.

This Roadmap is a clear sign of the NSW Government’s commitment to the State’s forests, the people who enjoy them, the businesses that depend on them and the environment they support.

Why wood is good: traditional and innovative uses of timber

Many of the items we use every day are made with forest-based materials. They are versatile, beautiful and renewable.

Traditional wood products form the backbone of the NSW forestry industry

- For our homes: framing, flooring, home insulation, weatherboards, outdoor decking, heating, tables, chairs, cabinetry, fence posts, tools, toys and art
- For our infrastructure: wharfs, railway sleepers, bridge girders, boats, and poles to support our telephone and electricity wires
- For our everyday use: books, toilet paper, printing paper, essential oils for medicinal and industrial use, brushes, seeds, nuts and honey

Emerging innovative wood products are important for the future of the NSW forestry industry

Internationally the industry is cultivating new customers in new markets - owing to its environmental credentials and development of new products for the emerging bio and carbon economies. Innovative wood fibre products include cosmetics, car parts, electronics, bio-fuels, rayon textiles and 3D printing.

Why wood is good: the recyclable nature of timber

In NSW, many companies reuse and recycle salvaged timber that isn’t chemically treated or painted. It can be used for a range of applications, including construction and furniture making. Old pallets and other timber can be recycled into useful products such as:

- Renewable energy
- Building products
- Mulch and compost
- Animal bedding

Why effective regulation is important

Laws, regulations, policies and enforcement help ensure the forestry industry is environmentally sustainable and continues to provide renewable wood products and associated socio-economic benefits, particularly for regional NSW.

Because native forests provide multiple non-timber values, such as biodiversity and clean water, effective regulation is vital to ensuring these environmental values are maintained in areas where harvesting occurs. They also strongly support the community acceptance for the industry.

The regulation of the timber industry in NSW is grounded in State and Commonwealth commitments to ecologically sustainable forest management. The National Forest Policy Statement, the NSW Regional Forest Agreements, the NSW Forest Agreements and various licences, approvals and codes guide how forestry in NSW is undertaken to ensure the maintenance of important conservation values of Australia’s forests and of the contribution that forest activities make to the national economy and rural and regional communities.

How native forestry contributes to the maintenance of biodiversity in NSW

Comprehensive regional assessments were undertaken in the 1990s to determine the environment, heritage, social and economic uses and values of forests. Nationally agreed criteria were applied to help protect forest biodiversity, old-growth forests and wilderness areas through the creation of a comprehensive, adequate and representative reserve system. Forest areas were also identified for commercial timber and other purposes. The assessments drew on existing material as well as a wide range of commissioned studies and technical reports to determine what the forests meant to the industries and people of each region, including Aboriginal Australians.

National Parks and other conservation reserves cover about 8% of the land area of NSW land areas. However conservation reserves alone were unable to solely conserve the biodiversity of NSW.
NSW Forestry Industry Roadmap: The way forward: 4 pillars

1 Regulatory modernisation

The NSW Government will implement a modern regulatory framework for the NSW forestry industry that ensures the industry is ecologically sustainable.

Many of NSW’s native forestry regulations are out-dated and overly complex, and no longer delivering the best outcomes for the community, the environment and the industry. Native forestry operations on public lands of NSW are regulated under the Integrated Forestry Operations Approvals (IFOAs), with operations on private lands regulated under the Private Native Forestry Codes of Practice.

The forestry industry is also managed in accordance with the Regional Forest Agreements (RFAs) and NSW Forest Agreements. RFAs are 20 year agreements with the Commonwealth that, together with the NSW Forest Agreements, IFOAs and PNF Codes, establish a framework for the sustainable management of NSW native forests.

Regulation of public native forestry

Native forestry on public land is regulated by the EPA under the Forest Act 2012, the National Parks and Wildlife Act 1974 and the Protection of the Environment Operations Act 1997. Forestry must operate to the standards set in the IFOA, which integrate the regulatory regimes for environmental planning and assessment, protection of the environment and threatened species conservation.

The current IFOAs are costly to implement, inefficient and lack clarity, and penalties for forestry offences – which in many cases have not been changed since 1974 – no longer align with modern standards for environmental penalties. They no longer reflect best industry practice, with many of the conditions being prescriptive, overlapping and unenforceable. The NSW Government has committed to remaking the coastal IFOAs, which consist of 12 separate licences and about 2000 conditions. The NSW Government has committed to remaking the IFOA with no erosion of environmental values and no net change to wood supply.

Regulation of private native forestry

Private Native Forestry (PNF) is regulated by the EPA under the Native Vegetation Act 2003, and is therefore treated in the same manner as land clearing.

The NSW Government commissioned an independent review of biodiversity legislation in NSW, which delivered its final report in late 2014. The NSW Government accepted all 43 recommendations, including one relating specifically to PNF. This recommendation found that PNF sat uncomfortably with the Native Vegetation Act 2003, and requested that the NSW Government review regulatory arrangements for PNF and consider options to regulate PNF based on scale and intensity, rather than tenure.

Under these changes, the sustainable harvesting of native forest timber will no longer be treated as a form of land-use change such as clearing. The review panel found that when undertaken sustainably, private native forestry is not a form of land use change, because the forest regenerates after harvesting.

Regulation of plantations

Regulation of plantation forestry in NSW occurs through the Plantations and Reafforestation Act 1999 and the Plantations and Reafforestation (Code) Regulation 2001.

Plantation forestry on both Crown land (including State forests) and freehold land is regulated and supported by Department of Industry. All new plantations (except for plantations of less than 30 hectares, which do not otherwise require clearing approval under the Native Vegetation Act 2003) are required to be authorised prior to establishment. Any existing unplanted plantations are required to be authorised prior to commencement of forestry operations in excess of 30 hectares.

Haulage and transport regulation

The forestry sector is heavily reliant on the haulage and transport sector and there is a need to consider both national and state policy in transportation access and identify gaps or inhibitors to forestry transportation access (including recognition of modernisation of haulage transportation of safer and more sustainable configurations). This could include consideration of strategic forestry transportation routes, identifying gaps in the network and other efficiency measures.

Where do we want the industry to be?

- Supported by a native forestry regulatory framework that balances economic benefits with community expectations, in a way that is efficient, outcomes based, enforceable and reflects modern best-practice regulation.
- Confident in new native forestry legislation that is underpinned by a rigorous and robust regulatory framework with modern penalties for environmental offences and a suite of regulatory tools.
- Operating under a new modernised and best-practice regulatory framework that continues to recognise key differences between forestry operations on public and private land.
- Operating under a new regulatory framework based on scale and intensity rather than tenure.
- Clear on regulatory requirements, rules, their responsibilities and penalties for non-compliance.

Operating within a fair and consistent framework, addressing the Independent Biodiversity Review Panel recommendations to no longer recognise private native forestry as a form of land clearing and consider regulating sustainable forestry operations based on their scale and intensity rather than tenure.

Operating under a new Coastal IFOA that is efficient, effective and outcomes focused, with no erosion of environmental values or reduction of wood supply.

Nationally consistent in delivering ecological sustainable forest management under the Regional Forest Agreements (RFAs) and National Forest Policy Statement.

The NSW Government considers there is an ongoing need for RFAs in NSW and will work with the Commonwealth to determine the most appropriate form going forward.

Mapping TECs

The EPA is working with the Forestry Corporation of NSW to map 18 priority threatened ecological communities (TECs) in coastal state forests. While TECs are already protected under legislation, they are difficult to identify in the field. A map of TECs will make it easier to identify, manage and protect them during harvesting operations.

The TEC mapping will bring a much higher standard of transparency and reliability to the management of forestry in areas where TECs occur.

How are we going to get there?

1. Commencement of the new native forestry regulatory framework.
2. Public consultation and finalisation of the review of the Regional Forest Agreements and NSW Forest Agreements.
3. Commencement of modernised penalties and regulatory tools for native forestry offences.
5. Public consultation on a draft new Coastal Integrated Forestry Operations Approval.

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7. The NSW Forest Industries Taskforce will review options and prepare a report considering national and state policy settings in the haulage and transport sector in identifying gaps or inhibitors to forestry transportation, the Taskforce will include recognition of modernisation in the sector, especially relating to safety.

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The NSW Government will balance resource supply and demand to increase business confidence and promote investment.

How are we going to get there?

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<tr>
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<tr>
<td>✓ Decisions made on balancing resource supply and demand, based on evidence and robust modelling.</td>
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<td>✓ Greater certainty of resource supply for industry will allow industry to plan investments, recruit and retain employees and build their business with renewed confidence.</td>
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<tr>
<td>✓ Industry and community should have confidence there is sustainability of supply.</td>
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<tr>
<td>✓ Greater transparency in price setting.</td>
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<tr>
<td>✓ Supply from native forests to be allocated within the confines of long-term sustainable yield levels and at the supply area scale.</td>
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<tr>
<td>✓ Create opportunities for the long-term establishment and management of plantations in key forestry areas or hubs and consider future infrastructure investments required to improve productivity and processing efficiency.</td>
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2. Work with industry as a matter of priority to examine and resolve North Coast hardwood Wood Supply Agreement concerns – 2017.
3. Renegotiate expiring Native Wood Supply Agreements to provide certainty and stability for all stakeholders into the future, while ensuring the supply of timber continues to remain ecologically sustainable – renegotiations commence end of 2016.
4. Release a discussion paper that will identify barriers to investment in new softwood and hardwood plantations and developing options for their removal. The NSW Government will work closely with the NSW Forest Industries Taskforce to finalise the Terms of Reference for this discussion paper, prior to it being released for public consultation in early 2017.
5. Improve timber resource and environmental modelling.

The NSW Government will aim to improve community acceptance of the forestry industry as a sustainable and renewable industry.

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<td>✓ Working with the community to deliver and enforce a credible, effective and transparent forestry regulatory framework.</td>
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<td>✓ Providing consumers with the information they need to confidently choose a sustainable NSW timber product, through the development of practical (online) tools, published research and participation in public consultations about NSW forestry policy and regulation.</td>
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<tr>
<td>✓ Transparent environmental and regeneration monitoring of state forests to determine the effectiveness of the IFOAs at achieving their objectives, within the framework of a broader landscape monitoring program across tenures.</td>
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The community must be confident the industry is sustainable, that the regulatory framework is effective and credible and the industry complies with the requirements of the regulatory framework.

In keeping with the NSW Government’s economic, social and environmental approach to sustainable forestry management, the NSW Government is committed to a more transparent regulatory framework to allow consumers to be more confident that products from NSW forests are obtained legally and harvested under a well-regulated system of sustainable forest management.
**NSW Forestry Industry Roadmap: The way forward: 4 pillars**

### Industry innovation and new markets

The NSW Government will support industry innovation and the exploration of new markets for forest products.

**Where do we want the industry to be?**

Globalisation has been changing the environment in which NSW businesses, producers and consumers operate, and while it presents challenges, it also offers new opportunities.

Initiatives that encourage new investment, innovation and environmental sustainability are vital to the future of the NSW forestry industry. Improving the competitiveness of the NSW forestry industry is a key component of the Roadmap.

The carbon economy presents challenges and opportunities for NSW. The forestry industry can play an important role in storing carbon and displacing use of higher carbon materials. This may be aided by the development of innovative biomass and bioenergy products, and the establishment of methods for carbon crediting. The Roadmap will ensure the forestry industry is well placed to capitalise on these opportunities and contribute to Australia’s low carbon economy.

**How are we going to get there?**

The NSW Forest Industries Taskforce was established in 2012 to provide members of the softwood and hardwood timber industries an opportunity to consider issues affecting the industries and provide advice to the Minister for Primary Industries.

The NSW Government will, as a matter of priority, ask the NSW Forest Industries Taskforce to identify opportunities and put forward recommendations on:

- a plan to foster innovation and entrepreneurship;
- identifying new markets for forest products with a focus on the low carbon economy;
- working more closely with planning and construction sectors to promote NSW timber building products.

**NSW Forestry Roadmap: key actions**

### Understanding the NSW Forest Estate

**State-wide**

1. Develop options for the renegotiation of the Regional Forest Agreements (RFAs) with the Commonwealth
2. Improve timber resource and environmental modelling
3. Review the regulatory arrangements for both public and private native forestry and develop a modern and simple regulatory framework
4. Commence modernised penalties and regulatory tools for native forestry
5. Build community understanding and confidence in the forestry industry
6. Seek stakeholder input on Private Native Forest Code of Practice
7. Commission an independent review of native forest Wood Supply Agreements
8. Support innovation and new markets including the carbon economy
9. Develop new native forest harvest and haulage standards with public consultation
10. Renegotiate expiring native forest Wood Supply Agreements

**North Coast**

1. Work with industry to investigate and resolve concerns with North Coast timber supply contracts
2. Complete a review of coastal IFOAs
3. Develop new native forest harvest and haulage standards
4. Assist industry through its transition to a smaller resource and maximise the opportunities of the carbon economy

**Cypress**

1. Conduct a review of the cypress sawlog resources
2. Develop new native forest harvest and haulage standards
3. Support innovation and new markets including the carbon economy
4. Review IFOAs for Brigalow-Nandewar and South Western Cypress forests

**Plantations**

1. Review barriers to investment in new plantations
2. Discussion paper on new investment in new long rotation plantations
3. Periodic review and update of Plantation & Reafforestation Act and Code
4. Support innovation and new markets including the bio and carbon economy

**Red Gum**

1. Support innovation and new markets including the carbon economy
2. Build community understanding and confidence in the forest industry
3. Develop new native forest harvest and haulage standards
4. Review IFOAs for Riverina Red Gum forests

**South Coast**

1. Complete a review of coastal IFOAs
2. Develop new native forest harvest and haulage standards
3. Renegotiate expiring native forest Wood Supply Agreements
4. Assist industry through its transition to a smaller resource and maximise the opportunities of the carbon economy

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The Roadmap is the NSW Government’s clear commitment that it supports all elements of the forestry sector in NSW. Transformation involves close collaboration between stakeholders now and into the future. Many of the most pressing policy and regulatory issues for the forestry industry require comprehensive solutions that will be dealt with in the short term.

The NSW Government will work with all stakeholders on the actions to be delivered under the four pillars.

**How can I get involved?**

The NSW Government encourages all stakeholders to participate in the consultation processes as we embark on this long-term journey of transformation.

Targeted consultation sessions will occur across the state on forestry-related issues across the North Coast, South Coast, Tableland Plantation, Cypress and Riverina Redgum.

Details of these consultation sessions will be made available on www.dpi.nsw.gov.au and www.epa.nsw.gov.au in due course.

**Who can I contact for more information?**

forests@industry.nsw.gov.au
forestry.policy@epa.nsw.gov.au
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