

Facts & Figures

2020/21

NEW ZEALAND PLANTATION
FOREST INDUSTRY



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Minister's Foreword



I have been involved in forestry for more than 20 years so to be appointed as Minister of Forestry is the realisation of a long-held ambition. The timing is particularly rewarding as we are in the middle of an era of change and growth for the forestry and wood processing sector. The release of this annual *Facts and Figures* document is a timely contribution to the process. In order to plan and make good quality decisions we need accurate information, and I am pleased to see this contribution from the Forest Owners Association.

Forestry exports are expected to increase 8.1 percent to \$6.0 billion for the year ending June 2021 due to strong demand for logs from China and robust demand for sawn timber from the US. Importantly, the World Bank has projected that the global demand for wood fibre will quadruple by 2050.

While our exports are strong, I also want to increase opportunities for more wood processing onshore, creating mills and wood processing plants in New Zealand and generating more jobs for Kiwis and supporting rural communities.

With more onshore wood processing we can use wood processing plants to create high-tech, high-value wood products and by-products to diversify the income streams of New Zealand's foresters.

It means creating biofuels, and biochemicals to support New Zealand's move away from fossil fuels and create a more sustainable future.

We have an opportunity to replace products such as concrete, steel and petrol with products made from wood grown and processed in New Zealand. To achieve this, we need to maximise the use of our current forests and ensure we are working with the primary sector to plant the right tree in the right place.

Already the majority of ETS planting is on land classes 6, 7, 8 which are not considered productive farm land. We want to continue to work to plant highly erodible areas in trees to shore-up our land and maximise the economic and environmental benefits of planting.

To reflect the need for enhanced planning and advice that can support the forestry and wood processing sector to achieve all of these gains, I have recently announced a greater role for a public forestry service. The new name, *Te Uru Rākau – New Zealand Forest Service*, signals a more hands-on role for the forestry service, with specialists and advisors working alongside the sector.

This name encompasses and emphasises the commitment we are making to our country's forestry and wood processing sectors, and to the high level of service, advice and management provided by *Te Uru Rākau – New Zealand Forest Service*. I am committed to providing a higher level of advice and service to the forestry sector, landowners, iwi, Councils and others to help New Zealand take advantage of these exciting times for forestry.

This partnership in forestry will play a key role in maintaining the momentum for the economic recovery across our wider primary sector, and sets a strong foundation for the future.

Hon Stuart Nash
Minister of Forests

SECTION 1

Planted Forestry Highlights



New Zealand Planted Forestry Highlights

1.665m ha is the estimated net stocked plantation forest area at 1 April 2020. This is a decrease in the plantation forest area of 31,347 ha from 1 April 2019.

1



IN 2020,

32.9 million m³

WAS HARVESTED FROM NEW ZEALAND FORESTS, DOWN 8.2% FROM THE 2019 CALENDAR YEAR (35.9 MILLION M³).

2

The value of all forestry exports to December 2020 was

\$5.65

billion. Of this, \$3.07 billion of export revenue for the year was logs.

3

MPI expects the value of forest exports to increase 12.8% to

\$6.25

billion for the year ending June 2021 due to strong demand for logs from China and robust demand for sawn timber from the US.

4

Source Box 1 MPI
Source Box 2 MPI
Source Box 3 MPI
Source Box 4 MPI

New Zealand Planted Forestry in Summary

Area and standing volume statistics	As at 1 April 2018 ^a	As at 1 April 2019	As at 1 April 2020
Forest area			
Net stocked area (ha)	1,704,494	1,696,584	1,665,237
Harvested area awaiting restocking (ha) ¹	50,072	51,609	45,192
Total forest area	1,754,566	1,748,193	1,710,429
Growth characteristics			
Standing volume (000 m ³)	482,511	494,618	501,116
Average standing volume (m ³ /ha)	283	292	301
Area-weighted average age (years)	17.63	17.91	18.25
Area by species²			
Radiata pine (ha)	1,532,444	1,525,711	1,494,429
Douglas-fir (ha)	104,258	103,410	98,380
Cypress species (ha)	9,928	9,825	9,987
Other softwoods (ha)	23,378	23,381	24,295
Eucalypts (ha)	22,148	21,777	21,485
Other hardwoods (ha)	12,339	12,481	12,662
Radiata pine area by tending regime			
Pruned with production thinning (ha)	145,859	140,318	138,754
Pruned without production thinning (ha)	574,564	547,042	530,346
Unpruned with production thinning (ha)	51,664	50,733	52,931
Unpruned without production thinning (ha)	760,358	787,617	772,398
Planting statistics			
	Year ended 31 Dec 2017	Year ended 31 Dec 2018	Year ended 31 Dec 2019
New planting³			
Total estimated new planting (ha)	6,000	7,000	19,000
Restocking (ha)	36,616	41,073	41,207
Harvesting statistics⁴			
	Year ended 31 Mar 2018	Year ended 31 Mar 2019	Year ended 31 Mar 2020
Harvesting			
Estimated planted forest roundwood removal (000m ³) ⁵	34,442	36,404	34,465
Average harvest age – radiata pine (years)	28.7	29.1	29.5

Notes

¹ The area of harvested land that was recorded as awaiting a land use decision has been reported in the area awaiting restocking.

² Individual entries may not add to totals due to rounding.

³ These forestry statistics, and in particular, new planting estimates, may differ from those produced in the Agricultural Production Survey by Statistics New Zealand. These surveys use different survey frames and designs.

⁴ All standing and harvest volumes are reported as recoverable volumes.

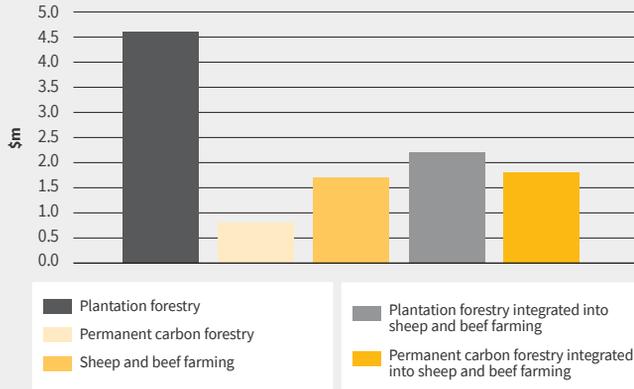
⁵ Estimate from the annual roundwood removal statistics.

⁶ The net stocked area for 2018 has been revised following updated returns from respondents and corrections of data issues.

Source National Exotic Forest Description NEFD 2020

Land Use and Returns

Annual Total Value Chain Impact per 1,000 hectares - Value-Add by Land-Use



Export Value Comparisons^{1,2,3}

Export product category	Million ha 2019*	Year to March 2021 exports million \$	Export dollar per ha/yr
Horticulture	0.1	6,735	50,749
Dairy	2.2	18,932	8,522
Forestry	1.6	5,907	3,697
Meat & Wool	8.9	10,220	1,148
All Pastoral Farms	11.1	29,152	2,622



Notes

¹ These export return figures do not take into account the different land class ratios used for the four listed industry categories, nor the shift of product across categories, such as beef from dairy cows.

² Neither charges nor payments under the Emissions Trading Scheme are calculated into these figures.

³ These are export figures alone and do not reflect the different domestic consumption levels across the primary sector. Nor do they reflect different ROI levels.

Source Annual total value chain impact per 1,000 hectares - Value-Add by Land-Use Economic Impacts of Forestry In New Zealand, PwC 2020

Source Export Value Comparisons *MfE/Stats 'Our Land 2021', MPI

Forestry and the Primary Sector

MPI anticipates the value of forest product exports will reach

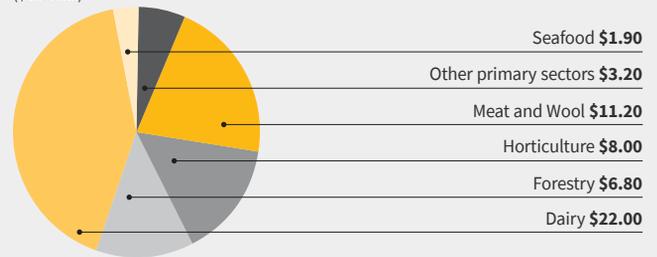
\$6.52 billion

in the year to June 2023, out of total food and fibre export returns of \$50.29 billion.

1

MPI Prediction for Primary Industry Sector Export Values 2022

(\$ billions)



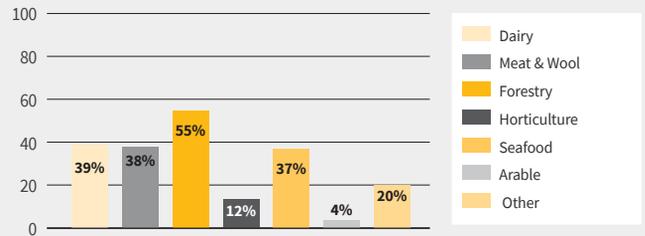
MPI Prediction for Primary Industry In-sector Export Values 2022

(\$ billions)

Export	Billions \$
Whole Milk Powder	\$7.28
Logs	\$3.33
Butter, Anhydrous Milk Fat & Cream	\$2.75
Lamb	\$3.02
Beef & Veal	\$3.46
Processed Forest Products	\$2.82

Proportion of Exports to China by Primary Sector 2021

(% percentage)



Source Box 1 SOPI June 2021

Source MPI Prediction for Primary Industry Sector Export Values 2022 SOPI June 2021

Source MPI Predictions for Primary Industry In-sector Export Values 2022 SOPI March 2020

Source Proportion of Exports to China by Primary Sector 2021 SOPI March 2021

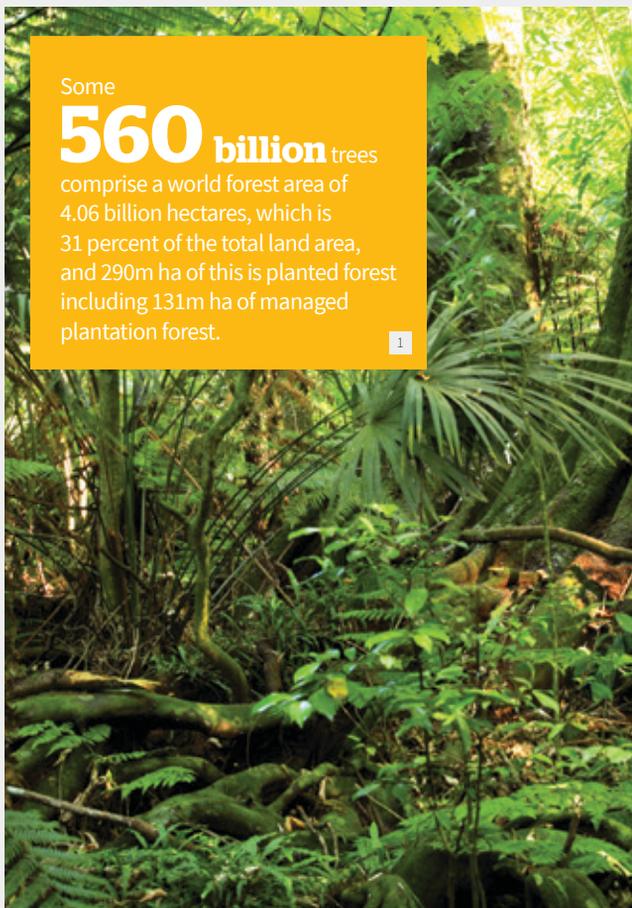
Global Forests



Global forests produce more than 5,000 types of wood-based products, and generate an annual gross value add of just over US\$ 600 billion, about 1% of global GDP.

About 350 million people who live within or close to dense forests depend on them for their subsistence and income.

Deforestation, forest degradation and land use change contribute about 12% of the world's greenhouse gas emissions.

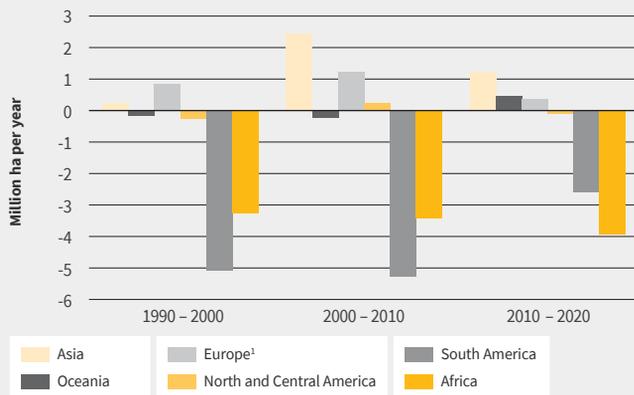


Some **560 billion** trees comprise a world forest area of 4.06 billion hectares, which is 31 percent of the total land area, and 290m ha of this is planted forest including 131m ha of managed plantation forest.

1

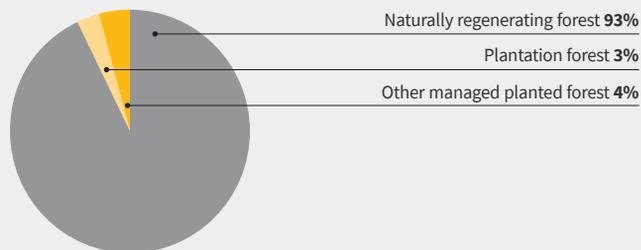
Source World Bank
Source Box 1 FAO Global Forest Resources Assessment 2020

Annual Forest Area Net Change, by Decade and Region, 1990-2020



Naturally Regenerating versus Managed Planted Forests

(% of global forest area)



World Proportion of Carbon Stock in Forest Carbon Pools



Notes

¹ According to the regional breakdown used in FRA 2020, Europe includes the Russian Federation.

Source Annual Forest Area Net Change, by Decade and Region 1990-2020 FAO Global Forest Resources Assessment 2020

Source Naturally Regenerating versus Planted Forests FAO Global Forest Resources Assessment 2020

Source World Proportion of Carbon Stock in Forest Carbon Pools FAO Global Forest Resources Assessment 2020



THE WORLD HAS LOST

178 million

HECTARES OF FOREST SINCE 1990, WHICH IS 6.5 TIMES THE AREA OF NEW ZEALAND, THOUGH THE RATE OF LOSS HAS FALLEN FROM 7.8M HA TO 4.7M HA PER YEAR, MOST OF WHICH OCCURS IN AFRICA.

1

World forests' carbon fell from 668 gigatonnes in 1990 to

662 gigatonnes in 2020.

2

The forest area designated for soil and water protection has increased from 200m ha in 1990 to

399m ha in 2020.

3

SECTION 2

New Zealand Planted Forestry



Planted Forest Mix and Ownership

Overseas Investment Office Consents Granted Under the Special Forestry Test: Existing Forestry & Conversion Investments

1 July 2019 – 31 December 2020

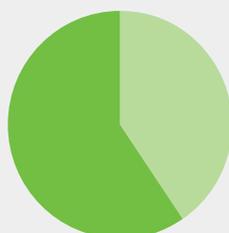
In 2018, the Special Forestry Test was introduced under the Overseas Investment Act 2005 as a more straightforward consent pathway for certain types of conventional forestry investments. It cannot be used for investments in permanent forestry.

Between 1 July 2019 and 31 December 2020, 47 one-off consents under the Special Forestry Test were granted by the Overseas Investment Office. Of those, 19 investments related to the conversion from farm land into forestry, and covered 15,840 hectares. The Overseas Investment Office expects that of the 15,840 hectares, approximately 9,126 hectares will be new planting. The remainder of the land may not be planted for a number of reasons, including that some of the land may be unsuitable for planting, already have existing forestry or indigenous vegetation on it, or be subdivided and sold.

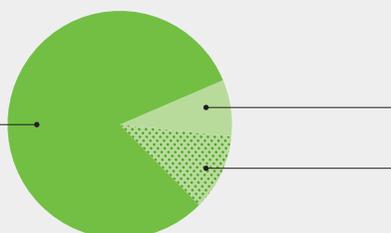
All applications granted by the Overseas Investment Office come with strict conditions of consent which consent holders must comply with.

Further information: <https://www.lin.govt.nz/overseas-investment>

Consents approved



Total Area (84,411 ha)



28 consents
Existing forestry

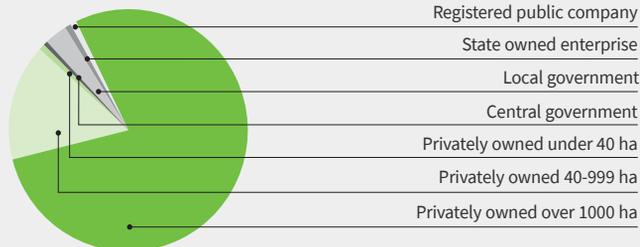
19 Farm conversion

Existing forestry total hectares: **68,571 ha**

Farm conversion total hectares: **15,840 ha**
of which: Farm conversion new forestry planting: **9,126 ha**

Planted Forest Ownership^{1,2,3,4,5}

As at 1 April 2020



Notes see page 12

NZ Plantation Forest Ownership - Underlying Land Status

As at 31 December 2020

Firm/Entity	Underlying Land Status (Productive area (ha))				Total
	Freehold	Leasehold			
		Crown	Māori Inc.	Other	
Kaingaroa Timberlands Limited	1,398		184,867		186,265
Hancock Natural Resource Group	82,723	8,763	59,286	20,002	170,775
Rayonier Matariki Forests	56,786	27,193	18,236	17,499	119,714
Ernslaw One	59,947	40,257	7,442	1,981	109,627
NZ Carbon Farming Group Ltd	46,452			43,155	89,607
OneFortyOne	22,697		39,682	567	62,946
Summit Forests NZ Limited	4,737	3,021	27,743	3,541	39,042
Tasman Pine Forests Ltd	25,306		9,044	2,249	36,599
Pan Pac Forest Products	5,356	818	28,738	417	35,329
Global Forest Partners LP	33,659			95	33,754
Juken New Zealand	9,907	14,593	6,675	1,124	32,299
Crown Forestry (MPI)	1,541		18,487	9,003	29,031
Forest Enterprises	28,655	2,008		627	31,290
Ngai Tahu Forestry	32,431				32,431
Wenita	5,815			23,369	29,184
Port Blakely Ltd	27,231			1,845	29,076
Aratu Forests Ltd	31,783		2,130	1,100	35,013
Roger Dickie NZ	29,073				29,073
Lake Taupo Forest Trust	23,498		1,007	3,142	27,647
Lake Rotoaira Forest Trust	7,676		431	1,347	9,454
China Forestry Group Corporation	14,138	6,294	617	5,938	26,987
City Forests	22,338			1,393	23,731
P F Olsen Ltd				5,164	5,164
The Rohatyn Group	966				966
Totals	574,113	102,947	404,385	143,558	1,225,004

P11 Notes

- ¹ Ownership is based solely on the ownership of the forest irrespective of the ownership of the land.
- ² Net stocked planted production forest area.
- ³ Significant changes in forest ownership occurred in 2003, resulting in large areas of forest previously owned by public companies now being privately owned.
- ⁴ "Privately owned" includes all privately owned forests. The legal entities included in this category are private companies, partnerships, individuals and trusts, which include Māori trusts and incorporations.
- ⁵ "Central government" forests are predominantly Crown-owned forests on Māori lease hold land. These forests are managed by the Ministry for Primary Industries.

Source **Planted Forest Ownership** NEFD 2020

Source **Consents Granted Under the Special Forestry Test: Existing Forestry & Conversion Investments** Overseas Investment Office

P12 Notes

Total Prod area is as at 31 December 2020

Source **NZ Plantation Forest Ownership - Underlying Land Status** FOA

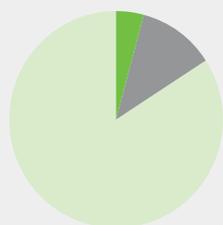
Commercial Planted Forest Ownership and Management

As at 31 December 2020

Firm/Entity	Forest Management Productive Area (ha)	
	(TIMO)	Property Management
Kaingaroa Timberlands Limited		186,266
Hancock Forest Management (NZ) Ltd		170,775
Hancock Natural Resource Group	170,775	
P F Olsen Ltd	1,250	105,383
Rayonier New Zealand Ltd		119,714
Ernslaw One	94,991	14,636
OneFortyOne		62,946
Summit Forests NZ Limited		39,041
Tasman Pine Forests Ltd		36,559
Pan Pac Forest Products		35,329
Juken New Zealand		32,299
Forest Enterprises	19,351	11,939
Port Blakely Ltd		29,076
Aratu Forests Ltd		28,817
Crown Forestry (MPI) ¹		29,031
Roger Dickie NZ	29,073	
Forest Management NZ Ltd		30,035
Ngai Tahu Forestry		26,126
Wenita		25,015
City Forests		23,731
NZ Carbon Farming Group Ltd		89,607
Global Forest Partners LP	15,461	
The Rohatyn Group	966	
Totals	331,867	1,096,325

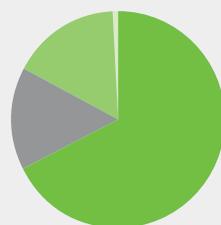
Number of Forest Owners by National Size Class

As at 1 April 2020



Forest Area by Forest Owner National Size Class

As at 1 April 2020



10,000+ ha 40-999 ha 1000-9999 ha <40 ha

Notes see page 14

Environmental Certification

As at 31 December 2020

Company	Environmental Certification Body	
	FSC (ha)	PEFC (ha)
Rayonier New Zealand Ltd	157,827	157,827
PanPac Forest Products Ltd	46,073	
NZ Forest Managers Ltd ¹	59,122	
Wenita Forest Products Ltd	29,182	-
Aratu Forests Ltd	35,013	35,013
Juken New Zealand Ltd	32,299	
PF Olsen Ltd	9,130	
Summit Forests NZ Limited	30,618	
The Rohatyn Group	966	
Kaingaroa Timberlands Limited	186,266	186,266
Port Blakely Ltd	37,370	
Southland Plantation Forest Company of New Zealand	13,907	
M&R Forestland Management Ltd	12,061	
China Forestry Group Corporation	20,050	
Tasman Pine Forests Ltd	36,559	
Ngai Tahu Forestry	45,828	
Forest Enterprises	18,066	
City Forests Ltd	23,731	
Ernslaw One Ltd	103,102	
Hancock Forest Management (NZ) Ltd	170,775	170,775
Craigpine Timber Ltd	2,266	
RMS FGI		5,164
OneFortyOne	79,935	
Total	1,150,146	555,045

P13 Notes:

This table is designed to identify who manages NZ forests.

Within "management" there are 2 main categories:

1) Timberland Investment Management (commonly referred to as a TIMO).

These organisations do not own any forest. The forests are owned by retail investors or institutional funds.

2) Property Management

- planning and managing field operations, mapping and maintaining records.

Some entities carry out both functions within the same organisation, others carry out both for some parts of a forest estate and not others.

¹All forests are managed by Crown Forestry, though day to day supervision is contracted to a range of forest management companies.

Source Commercial Planted Forest Ownership and Management FOA

Source Number of Forest Owners by National Size Class NEFD 2020

Source Forest Area by Forest Owner National Size Class MPI

P14 Notes:

¹Crown Forestry forests are managed under an FSC licence held by NZ Forest Managers

n.b. Productive Area = Net Stocked Area + Area Awaiting Restocking

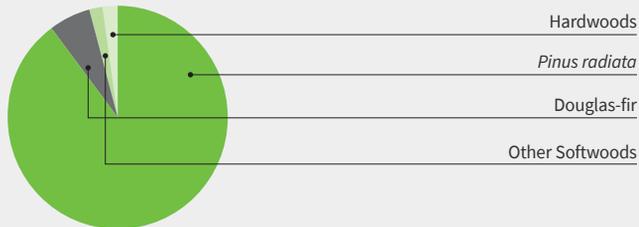
Total Certified Area = Total Forest Area as recorded on FSC certificate

Source Environmental Certification FOA

Planted Forests by Species

Species Distribution

As at 1 April 2020



Approximate Harvest Age Over the Past Five Years

Species	Harvest Age
Pinus radiata	29.3 years
Douglas-fir	41.4 years
Cypress	29.5 years
Eucalypts	21.7 years

Some **87%** of the trees in New Zealand plantation forests are *Pinus radiata*. Douglas fir is next with 7%. Hardwoods constitute 3% of the forest trees.

1

Minor Plantation Species

Other pines; *P. nigra*, *P. muricata*, *P. ponderosa*

Other softwoods; Redwoods, Larch, Cryptomeria, Cypress

Indigenous species; Kauri, Tōtara, Black Beech (Tawairauriki)

Other hardwoods; Poplars, Acacia, Willows, Black Walnut, Paulownia, Oaks

Non-durable eucalypts; *E. obliqua*, *E. fastigata*, *E. regnans*, *E. nitens*, *E. saligna*, *E. botryoides*.

Durable eucalypts; *E. globoidea*, *E. bosistoana*, *E. quadrangulata*, *E. pilularis*, *E. muelleriana*.

Most durable species include; *E. microcorys*, *E. cladocalyx*, Tōtara, Silver Pine (Manoao), Robinia, Puriri

Source Species Distribution NEFD 2020

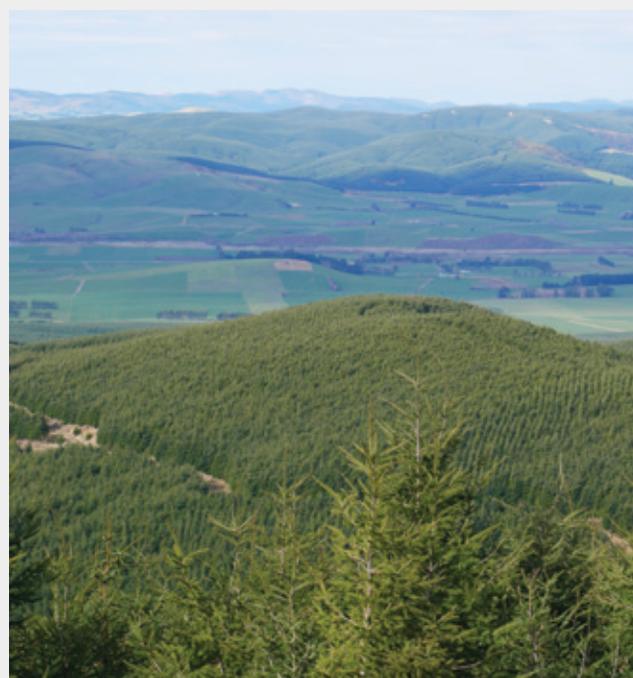
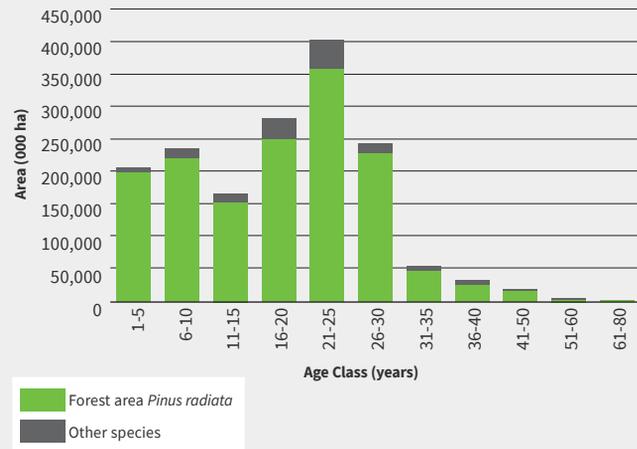
Source Approximate Harvest Age Over the Past Five Years MPI

Source Box 1 NEFD 2020

Net Stocked Area by Age Classes

Forest Area by 5 Yearly Age Class

As at 1 April 2020



Source Forest Area by 5 Yearly Age Class NEFD 2020

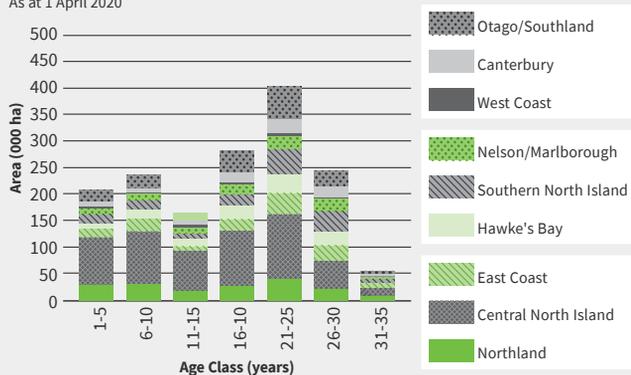
Planted Forest Area by Regions

Area Planted in all Species by Territorial Authority

Region	Estimated Total Forest Area (HA)			
	2018	2019	2020	%
Northland	187,489	185,943	188,586	11%
Central North Island	567,478	562,792	564,448	34%
East Coast	156,556	155,617	155,359	9%
Hawke's Bay	133,710	131,733	131,994	8%
Southern North Island	161,623	159,690	167,718	10%
Nelson/Marlborough	166,981	165,077	109,301	7%
West Coast	29,840	30,401	30,157	2%
Canterbury	95,735	94,782	96,721	6%
Otago/Southland	209,302	210,549	216,953	13%
Total	1,704,494	1,696,584	1,661,237	100%

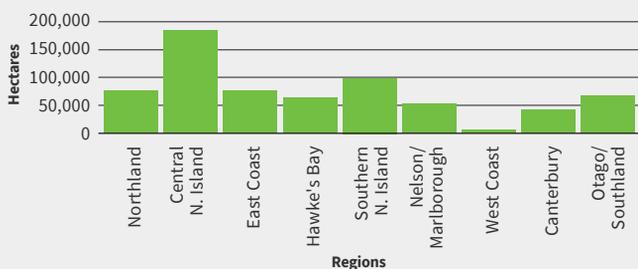
Forest Area by Age Class and Wood Supply Region

As at 1 April 2020



Forest Area Planted in *Pinus Radiata* by Territorial Authority

Of Harvestable Age (21+) Per Region (ha), as at 1 April 2020



Source Area Planted in all Species by Territorial Authority & Forest Area by Age Class and Wood Supply Region NEFD 2020

Source Forest Area Planted in *Pinus Radiata* by Territorial Authority NEFD 2020

Planted Forest Age and Volume

The total planted forest standing volume in April 2020 was

500 million m³,

an increase of 5.7 million m³ from the 2019 revised figure.



The average age of plantation trees was

18.3 years in April 2020, a increase from 17.9 years in 2019, indicating the 1900s peak planting is still more than offsetting the increased harvesting and new planting rates.

Age Class Over Time



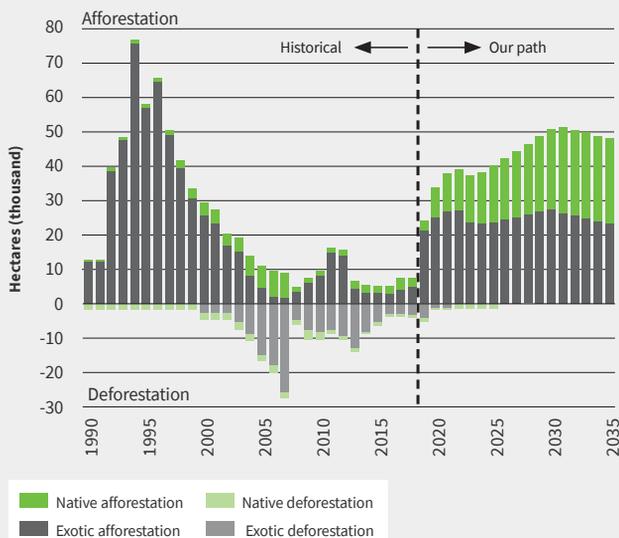
Source Box 1 NEFD 2020

Source Box 2 NEFD 2020

Source Age Class Over Time NEFD 2020

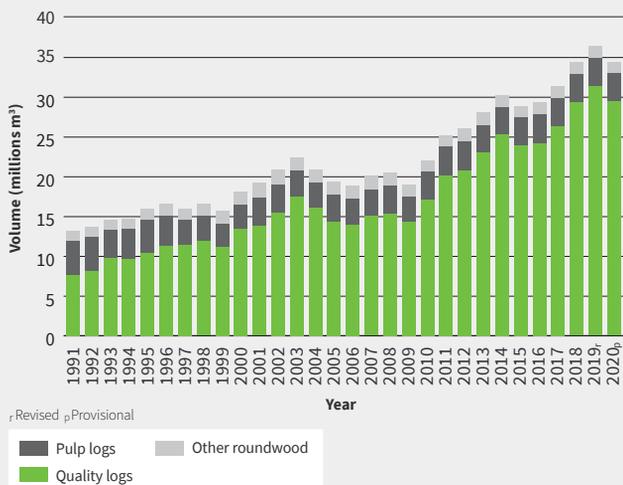
Forest Planting, Harvest and Deforestation

Afforestation and deforestation by year in the demonstration path¹



Plantation Forest Harvest

for year ended March



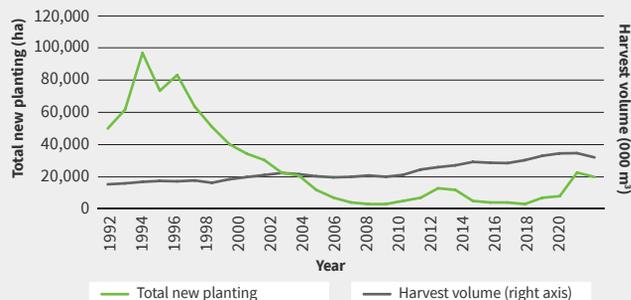
Notes

¹ Exotic afforestation/deforestation areas include non-production exotics

Source **Afforestation and deforestation by year in our path** Climate Change Commission
Source **Plantation Forest Harvest MPI**

Forest Plantings and Harvest Volumes

Year ended December 1992–2020



90,000 ha OF PLANTATION FOREST WAS PLANTED IN 2019, COMPRISING 70,799 HA OF REPLANTING AND 19,201 HA OF NEW PLANTING.

1

Tree Stock Sales from 2013 to 2020¹

	Tree Stock Sales from 2013 to 2020 (millions)							
	2013	2014	2015	2016	2017	2018	2019	2020 ^p
<i>Pinus radiata</i>	48.5	47.2	45.8	49.3	48	56.6	84	88.4
Other	5.6	3.6	3.7	3.4	3.3	3.3	4.8	3.5
Total	54.1	50.8	49.5	52.7	51.3	59.9	88.8	91.9

Estimated Percentages of Total Area of Radiata Pine Planting by Categories

	Estimated Percentages of Total Area of Radiata Pine Planting by Categories							
	2013	2014	2015	2016	2017	2018	2019	2020 ^p
Open pollinated seedlings	38	36	31	28	25	30	47	36
Control pollinated seedlings, cuttings/clones	62	64	69	72	75	70	53	64

Notes

¹ MPI expect 2020 seedling planting to be nearly 100,000 seedlings

² Individual entries do not add up to totals due to rounding to the nearest 100,000

Source **Plantation Forests and Harvest Volume** NEFD 2020

Source **Box 1** MPI

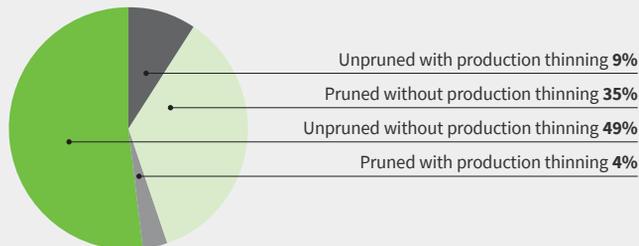
Source **Tree Stock Sales from 2013 to 2020** Tree Stock Sales, MPI

Source **Estimated Percentages of Total Area of Radiata Pine Planting by Categories** Tree Stock Sales, MPI

Forest Management Trends

Radiata Pine by Tending Regime

As at 1 April 2020



	2018 ^r Hectares	2019 ^p Hectares	2020 ^p Hectares
Pruned with production thinning	145,859	140,318	138,754
Pruned without production thinning	574,564	547,042	530,346
Unpruned with production thinning	51,664	50,733	52,931
Unpruned without production thinning	760,358	787,617	772,398

^rRevised ^pProvisional

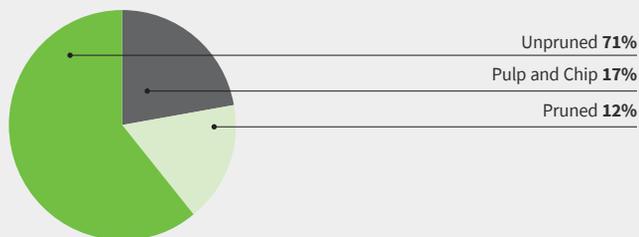
The area under an unpruned management regime

continues to grow, to now about **61%** of the *Pinus radiata* forest estate. A year ago the rate was reported at 55%.

1

Pinus Radiata Harvest Volume by Log Type

For Year Ended 31 March 2020



Source *Radiata Pine by Tending Regime* MPI

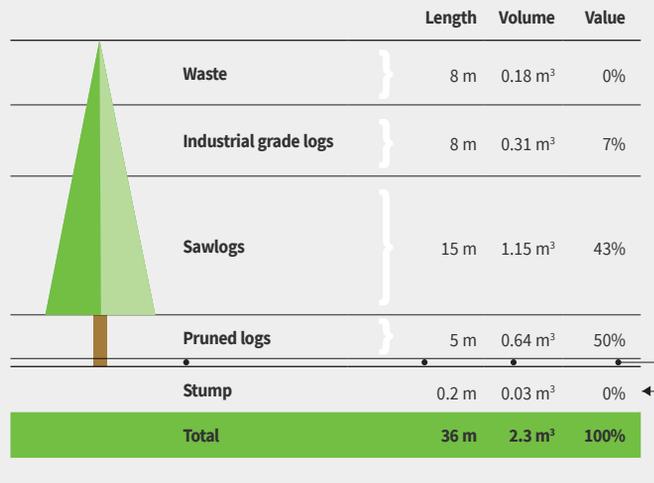
Source *Box 1* MPI

Source *Pinus Radiata Harvest Volume by Log Type* NEFD 2020

Typical Log Out-turn

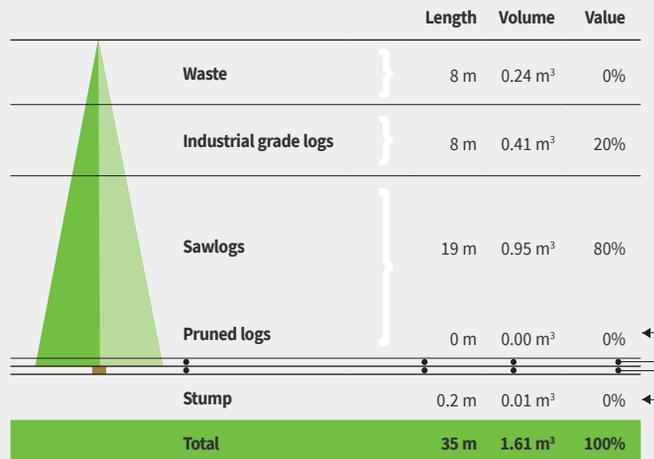
Direct Sawlog Regime

Pruned and thinned. Final Crop Stocking 228 stems per hectare.



Structural Regime

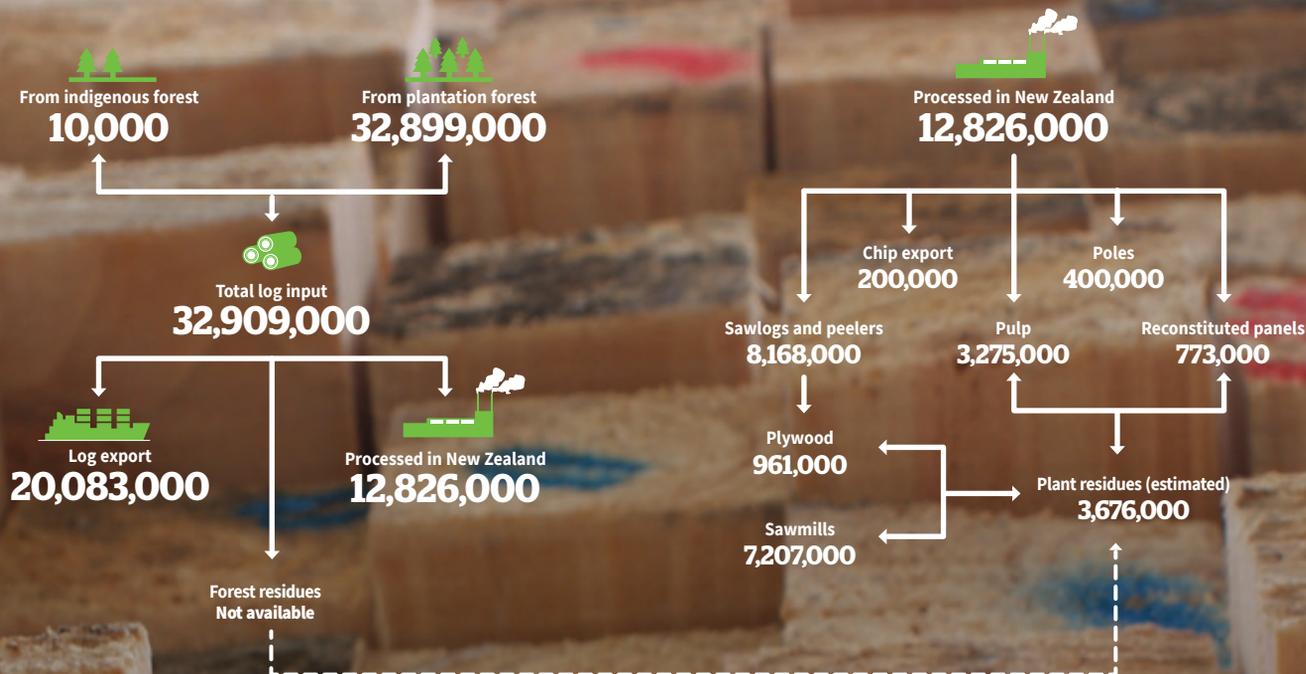
Thinned. Final Crop Stocking 487 stems per hectare.



Source *Direct Sawlog Regime & Structural Regime* Scion

Log Flow in the New Zealand Forestry Industry

For Year Ended December 2020, in tonnes



THE INDIGENOUS TREE HARVEST NOW REPRESENTS LESS THAN **0.03%** OF THE TOTAL.

Reporting a Suspected Pest/Disease

Sirex Woodwasp



Don't go down in history as the person who noticed something but didn't tell. Keep our forests free of new pests and diseases.

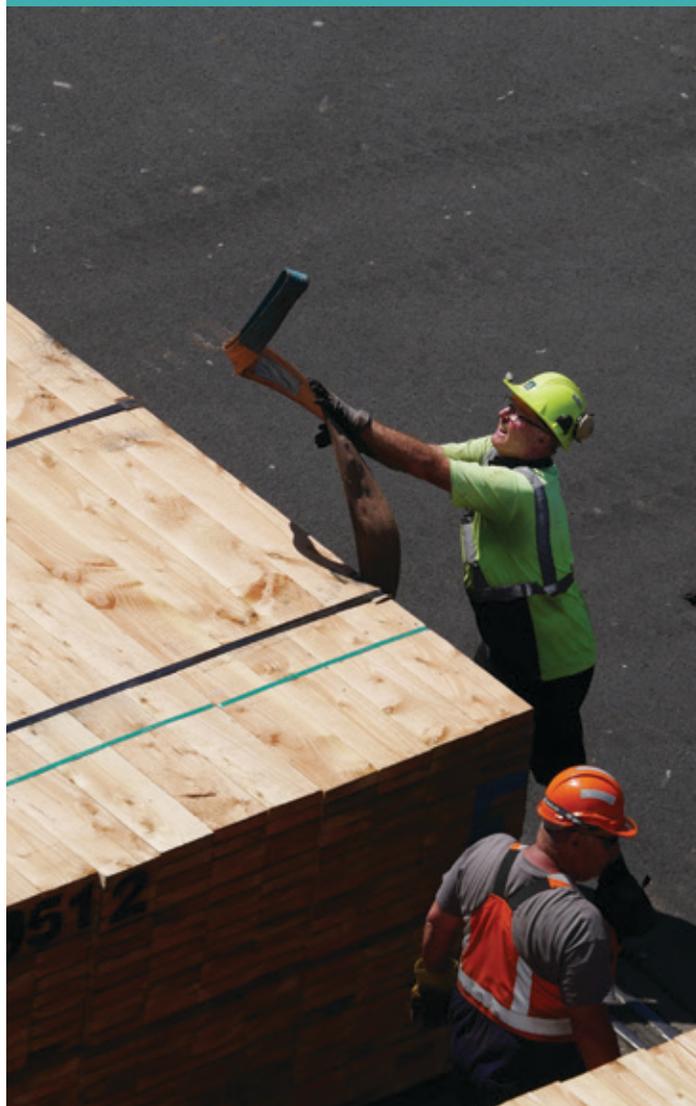
Infestations of the sirex woodwasp, accidentally imported into New Zealand more than a 100 years ago, causes pine trees to rot and India assesses it as a phytosanitary concern.

If you believe you've found something that shouldn't be here, phone MPI's hotline on **0800 80 99 66**. They will arrange for whatever photos, samples and site visits are necessary. Or, email to: **Info@mpi.govt.nz**, with 'Reporting a suspected pest/disease' in the subject line, and make sure to include contact name, phone number and location of the discovery. Photos of the pest and plant damage would also be useful.



SECTION 3

Export and Production



Top Export Destinations

For Year Ended March 2021

- 1 Most exports for category
- 2 Second most exports for category
- 3 Third most exports for category



1. China (People's Republic of) \$NZ 2,970,924,832

1	Logs	2,814,948,385
2	Panels	13,090,193
3	Paper & Paperboard	44,110,112
3	Sawn Timber & Sleepers	106,719,483
1	Pulp	268,319,319
	All other	5,645,105

2. Australia \$NZ 517,511,076

	Logs	2,463,445
2	Panels	60,125,587
1	Paper & Paperboard	171,233,958
2	Sawn Timber & Sleepers	118,896,516
	Pulp	58,885,232
1	All other	110,297,323

7. India \$NZ 157,503,630

	Logs	67,635,451
	Panels	4,524,600
	Paper & Paperboard	5,919,415
	Sawn Timber & Sleepers	3,266,941
	Pulp	45,730,981
	All other	2,607,519

8. Indonesia \$NZ 121,032,028

	Logs	165,889
	Panels	15,166,116
	Paper & Paperboard	4,997,006
	Sawn Timber & Sleepers	21,788,215
3	Pulp	59,223,837
3	All other	23,614,280

3. South Korea \$NZ 366,642,239

2	Logs	267,605,410
	Panels	2,589,105
	Paper & Paperboard	17,351,850
	Sawn Timber & Sleepers	21,189,525
2	Pulp	61,495,482
	All other	412,495

4. Japan \$NZ 335,915,675

	Logs	45,047,565
1	Panels	163,507,533
	Paper & Paperboard	459,173
	Sawn Timber & Sleepers	25,004,190
	Pulp	24,610,732
2	All other	68,912,165

9. Thailand \$NZ 123,395,238

	Logs	120,676
	Panels	351,527
2	Paper & Paperboard	61,936,307
	Sawn Timber & Sleepers	24,215,559
	Pulp	29,858,440
	All other	1,609,476

10. Viet Nam \$NZ 115,650,908

	Logs	1,633,050
	Panels	28,337,411
	Paper & Paperboard	12,275,152
	Sawn Timber & Sleepers	66,223,574
	Pulp	1,175,435
	All other	1,928,073

5. United States \$NZ 289,508,420

	Logs	22,719
3	Panels	33,611,823
	Paper & Paperboard	2,595,616
1	Sawn Timber & Sleepers	238,750,734
	Pulp	36
	All other	11,672,728

6. Hong Kong \$NZ 139,516,603

3	Logs	149,191,673
	Panels	798,654
	Paper & Paperboard	10,382,777
	Sawn Timber & Sleepers	97,944
	Pulp	863,287
	All other	635,819

11. Taiwan \$NZ 85,782,725

	Logs	24,288,252
	Panels	7,293,397
	Paper & Paperboard	5,774,816
	Sawn Timber & Sleepers	29,244,573
	Pulp	16,126,044
	All other	653,212

12. Other \$NZ 425,501,043

	Logs	2,907,919
	Panels	56,100,444
	Paper & Paperboard	110,458,763
	Sawn Timber & Sleepers	175,550,883
	Pulp	42,888,561
	All other	30,368,785

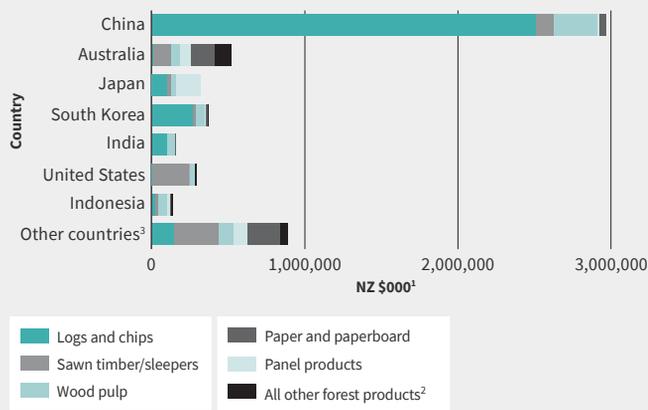
Export Value by Destination and Product¹

For year ended 31 December 2020

Total Export Value by Main Countries of Destination

Country of Destination	Total Export Value (NZD\$)		
	2018	2019	2020
China	3,243,381,444	3,272,196,860	2,970,924,832
Australia	702,372,063	575,135,608	517,511,076
Japan	420,419,941	408,747,127	335,915,675
South Korea	483,049,227	393,451,527	366,642,239
India	295,897,508	326,496,242	157,503,630
United States	255,765,110	251,542,925	289,508,420
Indonesia	187,562,854	145,667,501	121,032,028
Thailand	150,684,735	136,462,037	123,395,238
Vietnam	107,505,637	102,149,621	115,650,908
Philippines	101,289,775	97,682,329	65,977,809
Taiwan	116,727,809	86,952,920	85,782,725
Hong Kong	110,757,104	76,584,662	139,516,603
Malaysia	114,623,264	76,055,802	62,588,486
Saudi Arabia	48,870,040	60,637,234	52,699,453
Netherlands	39,662,510	44,302,035	37,597,690
All other destinations	319,864,048	250,070,037	206,637,605
Total	6,698,433,069	6,304,134,467	5,648,884,417

Exports of Forestry Products by Main Countries of Destination



Notes

¹ Values are NZ\$ f.o.b. and may include items, e.g. some plywood items, for which no quantities are given.

² All other forestry products include chips, mouldings, manufactures of paper and paperboard, furniture and miscellaneous forestry products.

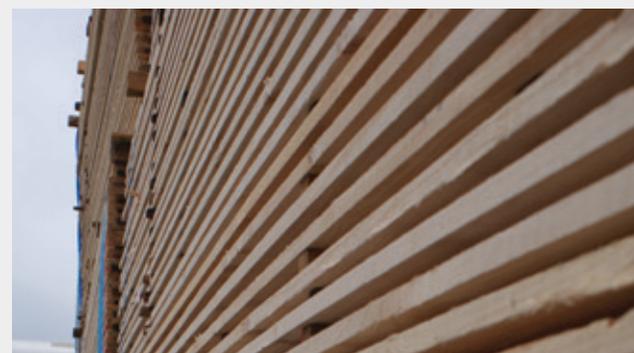
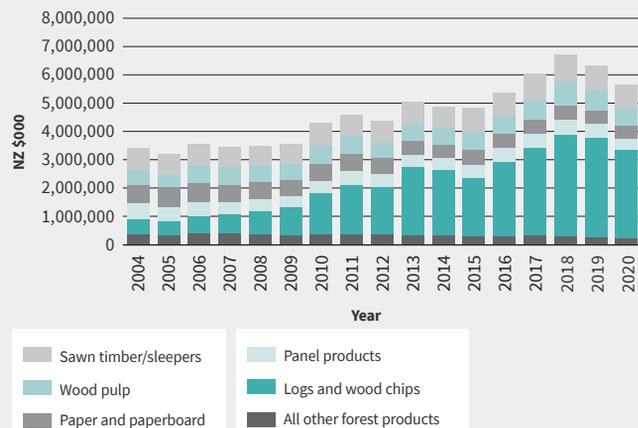
³ Other countries are all other countries to which New Zealand has exported forest products during the year.

Source **Top Export Value by Main Countries of Destination** MPI

Source **Exports of Forestry Products by Main Countries of Destination** MPI

Major Forest Product Export Earners¹

For year ended December 2020



Log and Wood Export Values



Notes

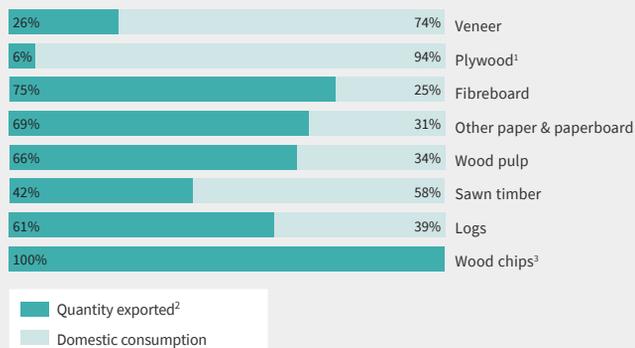
¹ Paper and paperboard includes Newsprint data, therefore differs from Statistics NZ data

Source **Major Export Earners** Stats NZ and FOA

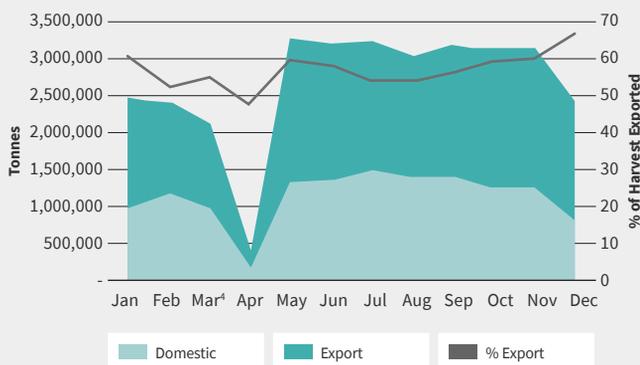
Source **Log and Wood Export Values** Westpac Economic Bulletin 2020

Production and Exports of Selected Forestry Products

For Year Ended 31 December 2020



NZ Plantation Harvest: 2020



MPI expects log exports to increase in value by **\$180 million**, in the year to June 2022 from the \$3,610 million in 2021, while other forest export returns remain static.

Notes

¹ Plywood includes laminated veneer lumber

² Exports excluded re-exports

³ Domestic consumption unavailable

⁴ NZ Covid lockdown 23 March – 13 May 2020

Source **Production and Exports of Selected Forestry Products** MPI, Statistics NZ and FOA

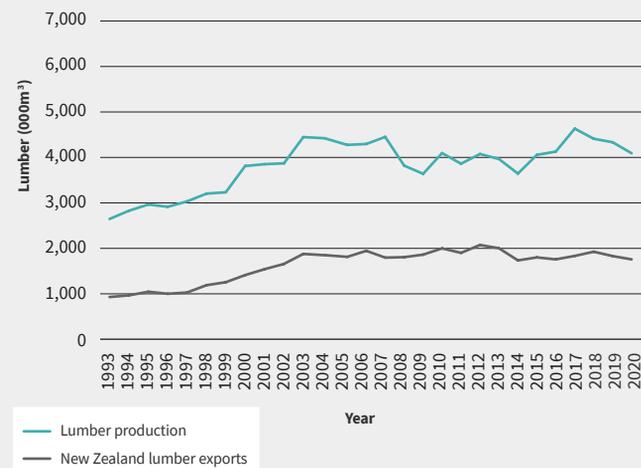
Source **NZ Plantation Harvest 2020** FGLT

Source **Box 1** SOPI June 2021

New Zealand Lumber and Log Production and Exports

Lumber Production and New Zealand Lumber Exports

For Year Ended 2020



Forestry Export Revenue, 2018-22 (\$NZ million)

For Year Ended June

Year to 30 June	Actual			Forecast	
	2018	2019	2020	2021	2022
Logs	3,337	3,806	2,877	3,230	3,330
Sawn timber & sleepers	890	936	809	930	950
Pulp	828	812	646	630	630
Paper & paperboard	491	491	492	460	440
Panels	501	514	438	460	500
Chips	56	67	56	50	60
Other forest products ¹	281	257	222	240	240
Total	6,382	6,883	5,539	5,990	6,150
Y/Y % change	+16.4%	+7.9%	-19.5%	+8.1%	+2.7%

About 16% of New Zealand's timber production is consumed within New Zealand, compared with the 15% for meat and the 5% for dairy production.

Notes

¹ Other forest products include: structural or moulded wood, furniture and prefabricated buildings

Source **Lumber Production and New Zealand Lumber Exports** Stats NZ and MPI

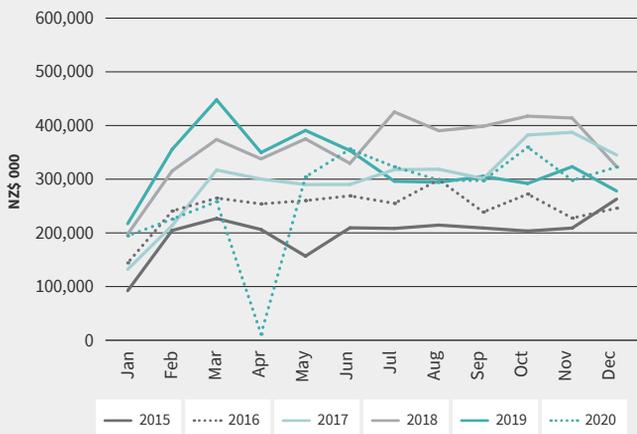
Source **Forestry Export Revenue, 2018-22** SOPI

Source **Box 1** FOA, Meat Industry Association and Dairy NZ

New Zealand Logs

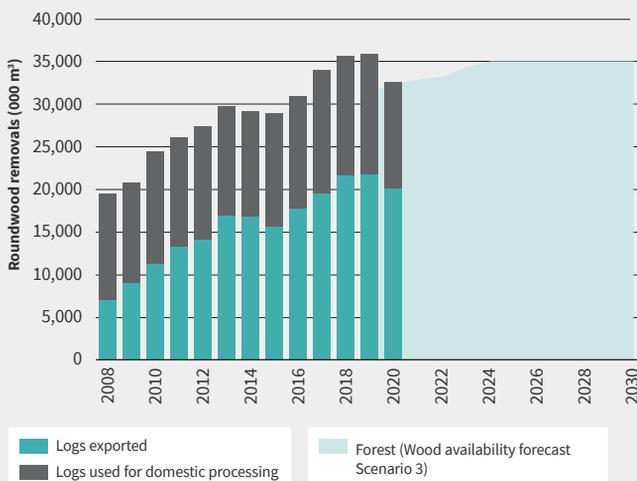
Export and Domestic Log Value

For Year Ended December



Volume of Logs used in Domestic Processing versus Exported

For Year Ended December



Source Export and Domestic Log Prices MPI
 Source Volume of Logs used in Domestic Processing versus Exported Stats NZ and MPI

Transformation Scenarios for New Zealand Forest Industry

2020



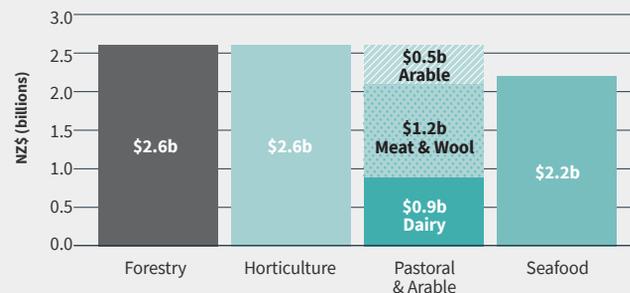
2030



+ In 2030
 We will need 15 more primary sawmills



Anticipated additional export sector returns in 2030



Notes

Both 2020 and 2030 harvests are assumed at 36mm³ of logs

Source A Transformation Scenario for New Zealand FOA
 Source Anticipated additional export sector returns in 2030 Fit for a Better World - Background analysis on export earnings in the primary sector

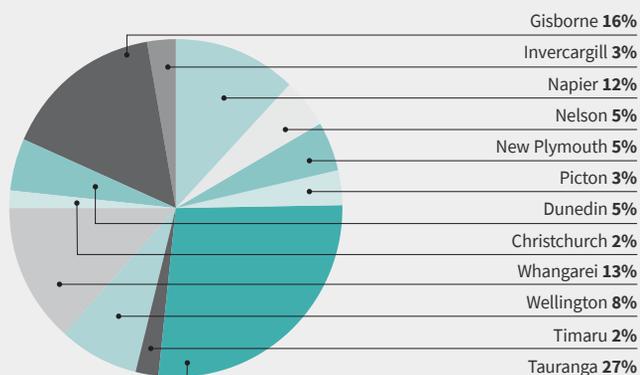
Log Exports by Port

Log Export Quantity and Export Value by Port

For Year Ended March 2020

Port of Loading	Export Quantity (m ³)	Export value (\$NZ)
Auckland	52,418	9,626,480
Christchurch	326,745	56,160,131
Dunedin	987,881	136,565,210
Gisborne	3,136,799	495,605,271
Invercargill	539,753	92,860,850
Napier	2,409,210	373,033,182
Nelson	962,529	132,588,946
New Plymouth	921,746	146,804,870
Picton	682,607	97,873,027
Tauranga	5,428,984	822,457,858
Timaru	431,619	61,981,140
Wellington	1,547,357	233,665,714
Whangarei	2,655,225	414,231,156
Total	20,082,874	3,073,453,835

Logs Percentage Export Quantity by Port¹



Notes

¹ Ports with <1% not included.

Source Log Export Quantity and Export Value by Port MPI

Source Logs Percentage Export Quantity by Port MPI

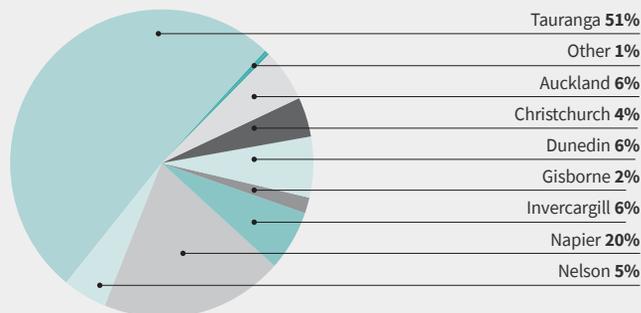
Sawn Timber Exports by Port

For Year Ended March 2020

Sawn Timber Export Quantity and Export Value by Port

Port of Loading	Export Quantity (m ³)	Export value (\$NZ)
Auckland	100,239	64,095,684
Christchurch	69,498	29,652,286
Dunedin	108,898	38,948,753
Gisborne	31,468	6,757,798
Invercargill	105,786	36,193,020
Napier	336,867	127,326,726
Nelson	81,749	34,411,336
Tauranga	880,906	506,431,675
Timaru	366	222,973
Wellington	3,723	4,968,298
Whangarei	708	397,141
Total	1,720,208	849,405,690

Sawn Timber Export Quantity by Port



Sawn Timber Production 2001-2020



Source Sawn Timber Export Quantity and Export Value by Port MPI

Source Sawn Timber Percentage Export Quantity by Port MPI

Source Sawn Timber Production to December 2020 MPI

Forest Processing Industry 2021

Updated March 2021

Northland

BBS Timbers Ltd, Whangarei	
CHH Woodproducts, LVL (Marsden Point)	
Colville Sawmill Company	
Croft Poles Ltd (Whangarei)	(S)
ETC 2006 Ltd, Marsden Point	
Juken New Zealand Ltd Northland Mill (Kaitaia)	(S)
Juken New Zealand Ltd Triboard Mill (Kaitaia)	
Kaihu Valley Sawmill, Mamaranui	(S ¹)
Kiwi Timber Protection Ltd, Whangarei	(MW)
Mac Direct Ltd, Patumahoe	(S)
Marusumi Whangarei Ltd (Marsden Point)	
Mt Pokaka Timber Products (Kerikeri)	(S)
North Sawn Lumber (Marsden Point)	
Northpine Sawmill (Waipu)	(S)
Rosvall Sawmill (Whangarei)	(S)
Timpack Industries Ltd, Auckland	(MW)
TTT Products (Tuakau)	
Waipapa Pine (Whangarei)	(S)

Auckland

Abodo Wood Ltd, Auckland	
Anderson & O'Leary Ltd (Pinepac), Whenuapai	
Big Tuff Timber Products Limited, Puhinui	
Central Frame and Truss, Auckland	
Claymark Ltd, Henderson	(MW)
Claymark Ltd, Thames	(S ²)
Cypress Sawmill, Waitoki	(S)
Herman Pacific Ltd, Silverdale	(S)
Max Birt Sawmills (Pokeno)	(S)
Jenkin Timber (Auckland)	
JSC Timber, Kumeu	(MW)

Kopine, Thames	
Max Birt Sawmill (Ohinewai)	(S)
Oji Fibre Solutions, Penrose	(PTP)
Pallet Supplies Co Ltd, Manukau	
Papakura Timber Processors Ltd, Papakura	(S)
Timberlab Solutions Ltd (Auckland)	
Topuni Timber Ltd, Kaiwaka	
TTT Products Ltd, Tuakau	(PO)
G J Weck and Sons Limited, Papakura	

Central North Island

Alkieman Custom Jointing Ltd, Tokoroa	
Central Wood Recyclers Limited	
CHH Woodproducts Kawerau Sawmill (Kawerau)	(S)
CHH Woodproducts, Plywood (Tokoroa)	(P)
Claymark Profiles, Rotorua	
Claymark Rotorua Sawmill Ltd (Rotorua)	(S)
Claymark Sawmills (Katikati)	(S)
Donnelly Sawmills (Rotorua)	(S)
Hautapu Pine Products Limited, Taihape	(PO)
Hume Pine (Rotorua)	
Kiwi Lumber (Putaruru)	(S)
KLC (Rotorua)	
Laminated Beams Ltd (Papamoa)	
Laminex Group (Taupo)	
Les O'Leary Limited, Tokoroa	(S)
Lockwood Group (Rotorua)	
Lumbercorp N.Z. Ltd Huntly	
LumberOne Ltd (Tauranga)	
McAlpines (Rotorua)	(S)
North Sawn Lumber Ltd, Ruakaka	

Oji Fibre Solutions Kinleith Mill (Tokoroa)	
Oji FS Tasman Ltd (Kawerau)	(PP)
Otorohanga Timber Company (Otorohanga)	
OTC Timber Co Ltd, Otorohanga	
Pedersen Kawerau Limited	(PP)
Pedersen Kinleith Limited	(PP)
Permapine (Reporoa)	
Pacific Pine Industries (Putaruru)	(S)
Pine Sawmills (Rotorua)	
Pukepine Sawmills (1998) Ltd, Te Puke	
Pure Pine Mouldings (Te Puke)	
Red Stag Timber (Rotorua)	(S)
R.H. Tregoweth Ltd, Te Kuiti	(S)
SCA Hygiene Australasia (Kawerau)	(PP)
Sequal Lumber (Kawerau)	(S)
Tauriko Sawmill & Timber Supplies, Tauranga	
Tenon Manufacturing Ltd (Taupo)	(S)
Timpack Industries Ltd, Mount Maunganui	(MW)
Waitete Sawmills Ltd, Te Kuiti	
Whakatane Mill Ltd (Whakatane)	(PP)
Winstone Pulp International (Ohakune)	(S, PP)
WJ Mouldings Ltd (Tauranga)	
WPI Tangiwai Sawmill & Pulpmill, Karioi	(S, PP)

East Coast

East Coast Lumber Ltd	
Juken New Zealand, Gisborne Mill	
Kiwi Lumber (Gisborne) Limited, Gisborne	
Wood Engineering Technology Ltd	

Hawke's Bay

East Coast Lumber (Wairoa)	(S)
Napier Pine (Napier)	(S)
Pan Pac Forest Products Ltd (Napier)	(S, PP)
Ruahine Timber 2017 Limited, Ormondville	(PO)
The Pallet Company Ltd, Napier	
Tumu Timbers (Hastings)	

Southern North Island

Clelands Timber Products Ltd (New Plymouth)	(S)
Davis Sawmilling Co (Featherston)	(S)
Eastown Timber Products Ltd (Whanganui)	(S)
Juken New Zealand (Masterton)	(S/PP)
Kaimata Sawmills, Inglewood	(S)
Kiwi Lumber (Dannevirke)	(S)
Kiwi Lumber (Masterton)	(S)
Lumber Processors, Pahiatua	(S)
Mangorei Plus, New Plymouth	(S, PO)
Mitchpine Ltd (Levin)	(S)
Pukeko Sawmills, Lepperton	(S)
Taranakipine, Bell Block	(S)
Taranakipine Ltd (New Plymouth)	
Taranaki Sawmills Ltd Techlam (Levin)	
Ticehurst Timber Processors Ltd, Carterton	
Timpack Industries Ltd, New Plymouth	(MW)
Value Timber Supplies Ltd, Inglewood	
W Crighton & Son Ltd (Levin)	(S)

Nelson/Marlborough

CHH Wood Products, Nelson Sawmill (Eves Valley)	(S)
D&E Taylor Timbers Ltd, Hope	
Eurocell Wood Products (Nelson)	
Goldpine Ltd (Richmond)	

Notes

¹ >50,000 BDU per annum.

² >20,000m³ production per annum.

Forest Processing Industry 2021

Continued

Halswell Timber Limited (Nelson)		Philip Wareing Ltd, Methven	
Heagney Bros Ltd, Blenheim		Point Lumber Ltd, Washdyke	(PO)
Motueka Lumber Co (Motueka)	(S)	Southern Pine Products Ltd (Christchurch)	
Nelson Forests Ltd (Renwick)	(S)	SRS New Zealand Ltd (Rolleston)	(S)
Nelson Pine Industries (Richmond)	(PP)	Starwood Products Ltd (Timaru)	
Oji Fibre Solutions (NZ) Tasman		Steve Murphy Limited, Kaiapoi	
Plankville Ltd, Richmond	(S)	Stoneyhurst Timbers Ltd (Christchurch)	(S)
Prowood Ltd (Motueka)	(S)	Sutherland & Co Ltd, Kaiapoi	
Southpine Ltd (Nelson)	(S)	Temuka Timber & Firewood, Temuka	
Southwood NZ Limited, Motueka	(S)	Timpack Industries Ltd, Timaru	
Timberlink New Zealand Ltd, Blenheim		Triple Trees Ltd T/A Waitohi Timber, Temuka	
Timpack Industries Ltd, Nelson	(MW)	Westco Lumber Ltd (Christchurch)	(S)
XLAM (Nelson)	(MW)		

Canterbury

Adams Sawmilling Co Ltd, Ashburton	(S)		
Ashley Industrial Services Ltd, Oxford	(S)		
Belfast Timber (Christchurch)			
Bennetts Sawmill Limited, Oxford	(S)		
Brindle Sawmills Ltd (Christchurch)	(S)		
Canterbury Roundwood 2006 Ltd, Rangiora	(MW)		
Canterbury Woodchip Supplies Limited, Arundel	(CEF)		

West Coast

International Panel and Lumber Ltd (Greymouth)	(PP)		
NZ Sustainable Forest Products Ltd (Reefton)	(S)		
Southern Pine Products Ltd (Stillwater) (Greymouth)	(S)		
Stillwater Lumber Ltd, Stillwater	(S, WP)		
Westco Lumber Ltd (Hokitika)	(S)		
Westimber Limited, Ngahere	(S)		

Otago Southland

Beven West Sawmilling Ltd, Invercargill	(S)		
Craiggpine Timber Ltd (Winton)	(S)		
Daiken Southland Ltd (Mataura)	(MW)		
Findlater Sawmilling Ltd, Winton	(MW)		
Gorton Timber Co Ltd, Milton	(S)		
Hewvan Enterprises Ltd, Palmerson	(S)		
Hollows Timber Co Ltd, Balclutha	(S)		
Lindsay & Dixon (Tuatapere)	(S)		

Ngahere Sawmilling Co (Gore)	(S)	Sawmills	
Niagara Sawmilling Co Ltd (Invercargill/Ashburton)	(S)	<25,000	S ¹
Otago Lumber (Gore)	(S)	25,000 – 49,999m ³	S ²
Pan Pac Otago (Mosgiel and Milton)	(S)	50,000 – 99,999m ³	S ³
Pankhurst Sawmilling (2015) Ltd, Riverton	(S)	100,000 – 249,999m ³	S ³
Pooles Timber Ltd t/a Great Southern, Invercargill	(S)	250,000 – 499,999m ³	S ⁴
Southwood Exports (Awaaura)		>500,000m ³	S ⁵
Stuart Timber Co Ltd (Tapanui)	(S)	Processing Plants	
Timpack Industries Ltd, Dunedin	(MW)	Fibreboard (MDF & Hardboard)	F
Truss Tech (Cromwell)		Particleboard (Incl Strandboard)	P
Young Brothers (2016), Mosgiel	(PO)	Plywood	PL
		Poles	PO
		Pulp and Paper	PP
		Veneer/LVL/CLT	V
		Paper/Tissue/Paperboard	PTP
		Chip Export Facilities ¹	CEF
		Manufactured Wood Products ²	MW

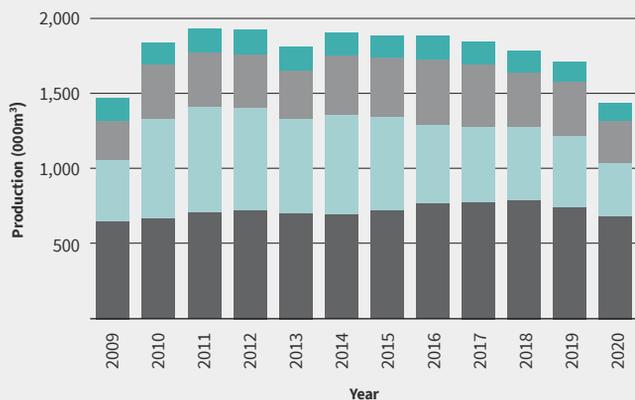


Paper, Pulp and Panel Products Production

Paper and Pulp Production 2009-2020



Panel Products Production



Notes

- ¹ Mechanical Pulp is those export items in HS item grouping 4701.
- ² Chemical Pulp is those export items in HS groupings 4702, 4703, 4704 and 4705.
- ³ All other paper and paperboard includes printing and writing paper, other paper and paperboard.
- ⁴ Fibreboard includes MDF, hardboard & softboard.
- ⁵ Plywood includes laminated veneer lumber.

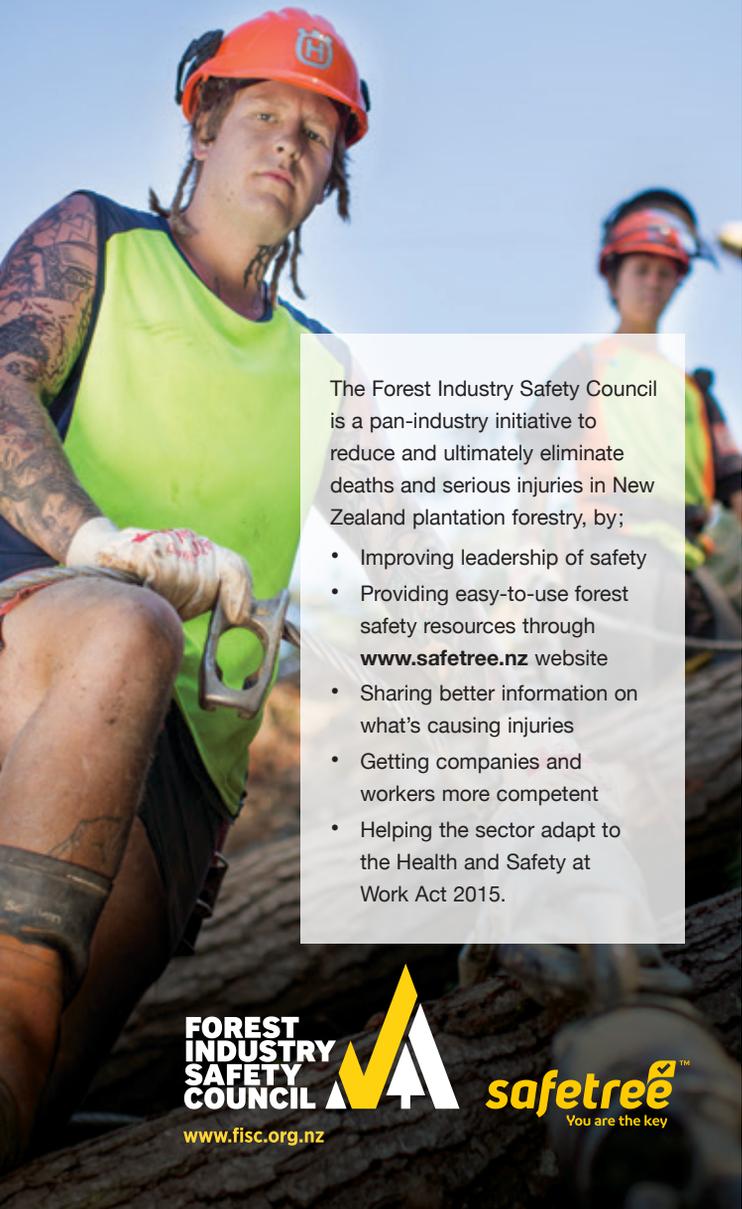
Source **Paper and Pulp Production** MPI
 Source **Panel Products Production** MPI

SECTION 4

Health, Safety and Training



TOGETHER TOWARDS ZERO



The Forest Industry Safety Council is a pan-industry initiative to reduce and ultimately eliminate deaths and serious injuries in New Zealand plantation forestry, by;

- Improving leadership of safety
- Providing easy-to-use forest safety resources through www.safetree.nz website
- Sharing better information on what's causing injuries
- Getting companies and workers more competent
- Helping the sector adapt to the Health and Safety at Work Act 2015.

**FOREST
INDUSTRY
SAFETY
COUNCIL**

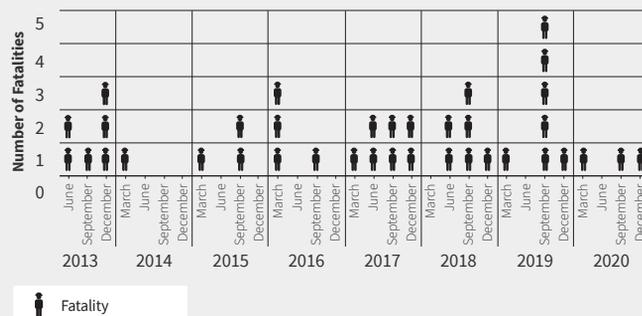


safetree[™]
You are the key

www.fisc.org.nz

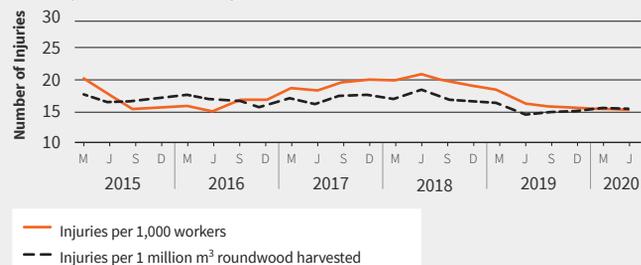
Health and Safety in the Forest Industry 2013-2020

Fatalities



Severe Injuries¹

Rate of injuries to workers resulting in more than a week off work



How Do We Compare?²

Rate of injuries to workers resulting in more than a week off work



Notes

¹ Rolling average last four quarters.

² Rolling average last four quarters per 1,000 workers.

Injury data in this dashboard is based on ACC claims where someone receives a period of weekly compensation within a quarter. This data lags by 6 months due to claim processing time.

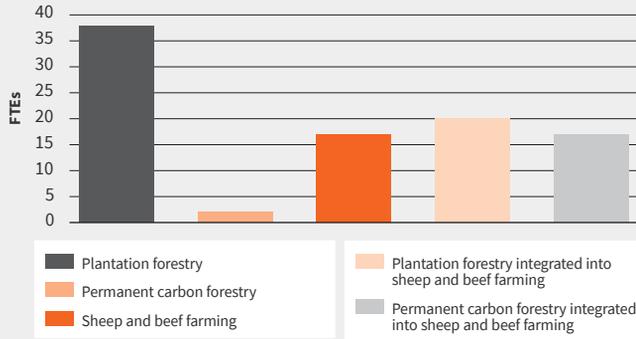
Source **Fatalities** WorkSafe/MPI/FISC

Source **Severe Injuries** WorkSafe/MPI/FISC

Source **How Do We Compare?** WorkSafe/MPI/FISC

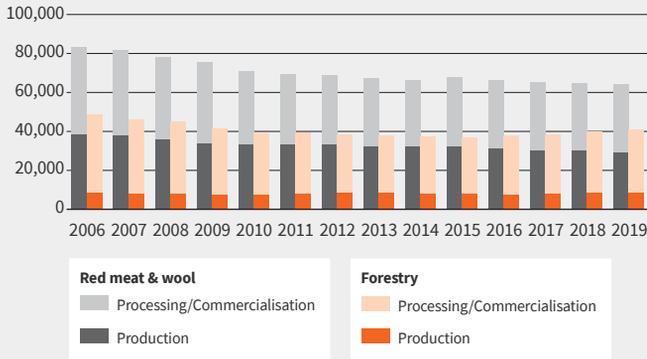
Forestry Workforce

Annual total value chain impact per 1,000 hectares - FTEs by land-use

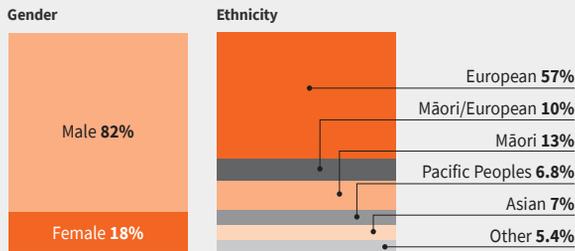


Employment Counts

Red meat & wool and Forestry industries 2006-2019



Forestry Sector Gender and Ethnicity 2019



Source: Annual total value chain impact per 1,000 hectares - FTEs by land-use Economic Impacts of Forestry In New Zealand, PwC 2020

Source: Employment Counts Human capability in the primary industries, MPI

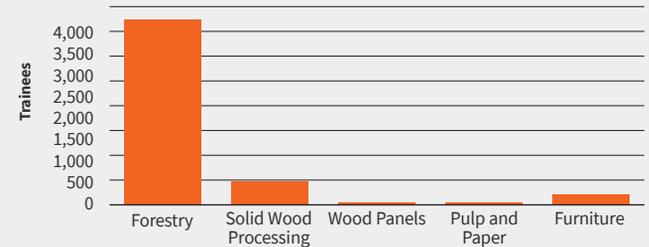
Source: Forestry Sector Gender and Ethnicity 2019 Human capability in the primary industries, MPI

Industry Training 2020

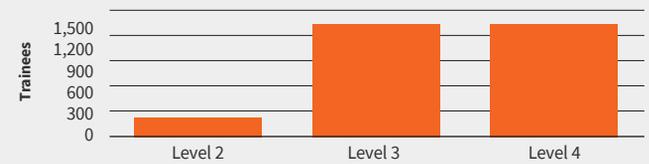
22 students completed their degrees at the University of Canterbury School of Forestry in 2020 – 18 with a Bachelor of Forestry Science and 4 with a Bachelor of Engineering (Forest Engineering) degree.

1

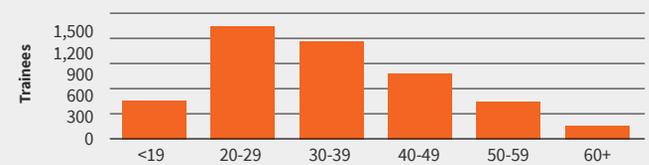
Trainee Count



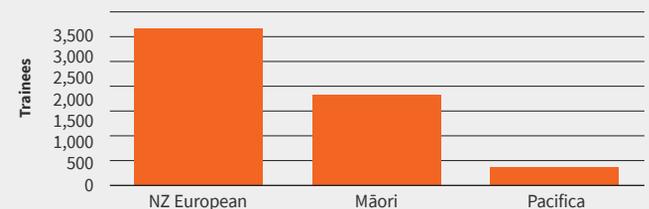
Trainee by Qualification Level



Trainees by Age



Trainees by Ethnicity



Source: Box 1 University of Canterbury

Source: Industry Training 2020 Competenz

Free forestry training*

Includes forestry apprenticeships,
traineeships and micro-credentials

Employers of first or second-year
apprentices may be eligible for wage
subsidies

Micro-credentials are available
in tree planting and the forestry
environment

Flexible programmes to suit your
business.

*Forestry qualifications are free from 01 July 2020 to 31 Dec 2022

Contact your account manager
to talk about free training today

0800 526 1800

freetraining@competenz.org.nz

competenz.org.nz

SECTION 5

Supplementary Information



Forestry Roadmap to 2050

Vision for 2050: Forestry will be New Zealand's number 1 primary sector and exemplify the best plantation forest management in the world.

01

Tree growth and forest production efficiency will have both doubled.

02

Our increasingly diverse forests will provide valuable products tailored to our customers' needs.

03

People will be attracted to work in forestry because they will be safe, valued and well trained.

04

Expanding commercial plantation forestry will have been the prime means of achieving New Zealand's net zero carbon goal by 2050, while providing other substantial environmental and social benefits.

05

Our licence to operate will have widespread support.



Forest Growers Levy Trust Inc



The current Harvested Wood Material Levy Order runs from 2019 to 2025. It is the second six-year order for wood material under the Commodity Levies Act 1990 voted for by Levy payers during the period. The Levy is paid on logs delivered to mills and ports. The rate for 2020/21 is 33 cents per tonne of harvested log.

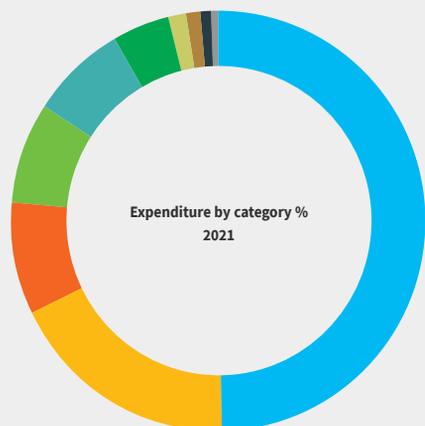
The Levy generated in 2020 was \$8,667,677, which was less than in 2019, mostly due to the covid lockdown disruption.

The Levy investment, through a yearly industry good Work Programme, is made by a seven-person board with an independent chair and representation of both larger and smaller scale foresters.

<https://fglt.org.nz/>



How the FGL is Invested



49.6% Research, Science and Technology

The large research programme is focussed on improving the profitability and sustainability of forest growers large and small and extends across the value chain from genetics to the harvesting supply chain. It covers research on raising the productivity of radiata pine through better site and stand management, understanding and responding to needle diseases such as red needle cast, finding longer term solutions to the wilding conifer problem in parts of New Zealand and better understanding of forest fire behaviour.

Two new programmes commenced during the year, one on improving the efficiency and cost effectiveness of vegetative plant propagation systems and the other on introducing new automation and robotics technology into the post-harvest supply chain with the aim of enhancing safety and attractiveness of forestry work.

Licence to operate issues were addressed with projects to reduce the incidence of tree breakage on steep land, and the development of harvesting equipment to remove harvesting slash from waterways on steep land. The programme also has a focus on other commercial tree species and overcoming some of the processing challenges to give land owners greater confidence to grow these species. A joint project with the Radiata Pine Breeding Company to assess growth performance of the latest improved genetics was also started during the year.

18% Operational Costs (incl. Administration)

Represent Levy collection and database maintenance costs, business compliance costs and all direct costs associated with supporting FGLT secretariat and the planning, management and delivery of the annual Work Programme.

8.6% Promotions

NZ Wood/Love our Forests campaign in print, television, social media and highway billboards. Publications, including Facts and Figures, external memberships, sponsorships. Close coordination with the Training and Careers committee for the maintenance of Careers and Training website and collateral material for Regional Wood Councils. Regional support of careers promotion. Public opinion surveys.

7.9% Forest Biosecurity

Forest biosecurity surveillance of high-risk sites including field activities and diagnostic identification of samples. Work has continued on the development and field trialling of a general surveillance app – Find-A-Pest – with co-investment by MPI and other stakeholders, and work continued alongside other sectors on the development of a Plant Production Biosecurity Scheme.

7.3% Health and Safety

This is the industry commitment to support the work of the Forest Industry Safety Council (FISC). 2020 initiatives marked the reaching of 260 Certified Contractors and the launching of a major review of the Certified Contractor scheme to build on this success. Injury rates that require more than a week off work have reached all-time lows in 2020. The FGLT contribution to FISC supported ACC and WorkSafe health and safety initiative based funding worth a combined \$754k.

4.5% Training and Careers

The Training and Careers Committee serves small, medium and large plantation forest owners, as one forum including; FISC, FICA, the Forestry and Wood Processing Workforce Council, the Forestry Rove Advisory Group and Competenz, as well as government, funders and training providers.

The Committee oversees the Forestry Careers website – <https://www.forestrycareers.nz/about-us/> and manages both Facebook and Instagram sites to promote forestry careers.

The Committee actively promotes forestry careers, both directly and by working with and through other agencies and develops and distributes resources to assist training and career providers.

Some training providers are also assisted directly, with FGLT funding and targeted resources, including support for the University of Canterbury School of Forestry, the Grow Me and Generation programmes and Tokomariro School forestry training.

Future Foresters are supported in providing professional development courses for their members and to represent the industry at career functions nationally.

1.3% Forest Resources and Environment

This Committee develops policies on forest growing and environment issues, including collective data on FSC certified forest companies' biodiversity management, climate change, freshwater management and carbon sequestration.

The Committee advises government on environmental matters. It provides guidance and management support on rare and endangered species in plantation forests.

A focus has been on representing industry views and informing industry on legislative changes, such as the NES-PF, the NES-IB and the RMA reforms.

1.1% Small and Medium Forest Enterprises

A major project for this Committee in 2020 was Stage One of the TreeFarmer web tool, a prototype geospatial web tool to improve small-scale forest growers' harvesting (SSFSG), through raising the grower's awareness of the issues and decisions.

This Committee monitors industry initiatives being headed by other sectors of the industry relevant to the SSFG and helps communicate these initiatives to the SSFG.

0.9% Transport

This Committee works closely with the Log Transport Safety Council. The Committee developed, with SCION, a Log Transport Calculator to analyse the transport volumes at a regional or even individual road level. This is now used regularly regionally to calculate log traffic.

The Committee represents forest growers' interests at local and central government. Research into fatigue and other issues will make log transport safer and more productive.

A major initiative this year was the updating of the Log Transport Safety Accord.

0.45% Fire

The Levy helps fund the fire season awareness campaign conducted by Fire and Emergency New Zealand, along with promoting fire awareness through the established Love our Forests campaign. The committee also partners with FENZ throughout the year to support rural fire prevention and management.

New Zealand's Greenhouse Gas Inventory

The Carbon Cycle

Planting trees begins a cycle that continuously removes, releases and re-absorbs greenhouse gases such as carbon dioxide. As trees grow, they absorb carbon dioxide through the process of photosynthesis.

The carbon dioxide absorbed by the growing forest remains stored within the wood products used throughout the lifetime of the building structure or product.

When a structure or product reaches the end of its lifetime, the carbon dioxide is released back into the atmosphere as the wood decays or is burnt as fuel.

Wood can be recycled to extend its lifetime and slow down the natural release of carbon dioxide back into the atmosphere. Once the carbon dioxide is released, it is available to be re-absorbed by growing trees.

New Zealand's Greenhouse Gas Inventory

In 2019, New Zealand's total gross emissions were 82.3 million tonnes of carbon dioxide (Mt CO₂-e). In 1990, gross emissions were 65.8 Mt CO₂-e.

In 2019, 27.6 Mt CO₂-e was removed from the atmosphere by the forestry sector, compared with 24.0 Mt CO₂-e in 1990. Forestry sector carbon removals in 2019 reduced total emissions to 54.7 Mt CO₂-e net or a 33.5% offset.

Agriculture continued to be the largest contributor to New Zealand's Greenhouse Gas Emissions, with 48.1% of the total at 39.6 Mt CO₂-e, compared with energy at 41.6%.

	Total emissions (million tonnes CO ₂ -e)	2018-20 Population (millions)	Emissions per each (tonnes CO ₂ -e)
Sheep	8.53	26.8	0.32
Deer	0.49	0.9	1.84
Beef	5.89	3.9	1.51
Dairy	14.01	6.3	2.22
Vehicles	16.5	3.8*	4.34*



A typical 20 year old plantation pine tree will store 1 tonne of CO₂. This will offset all the greenhouse gas emissions through the life of an average sheep. 20 such trees will more than offset the emissions from 9 cows or 4 vehicles for 1 year.

Notes

¹ Based on figures from the Agricultural Inventory Model, used in New Zealand's Greenhouse Gas Inventory 1990-2017 report published by MfE

*Automobile Association

†Motor Industry Association

Source MfE, FOA

Source PCE, Primary sector bodies

Forests Removing Carbon

How is carbon removed from the atmosphere by New Zealand's forests?

Forests act as carbon sinks – a reservoir which removes and stores more carbon from the atmosphere than it releases. Trees use carbon dioxide (CO₂) as part of their 'breathing' cycle – taking in CO₂ and storing it within roots, trunks and branches – and releasing oxygen.

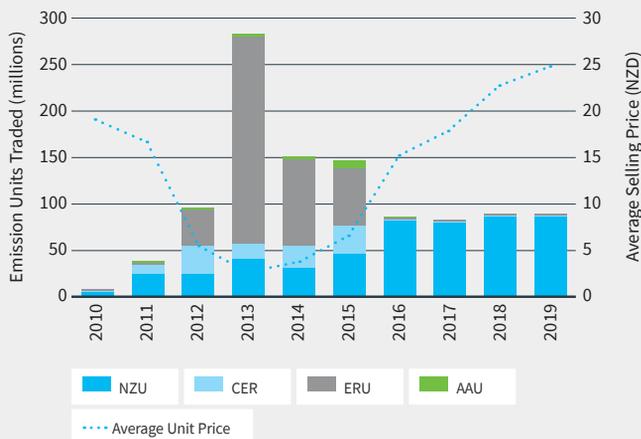
A young forest will remove small amounts of CO₂ until the trees establish and when forests will remove the most carbon. As a forest ages and its growing process slows, it will revert to absorbing less carbon again.

At harvesting, the forest ceases to be a carbon sink. But instead of releasing all the carbon it has stored, the harvested wood retains some of it. All wood products store carbon that will eventually be released, however the rate at which that carbon is released depends on the type of product and the type of treatment the wood has undergone.

The amount of carbon removed by New Zealand's forests is therefore dependent on the coverage of forestland, the age and species of the trees and the rate of harvest.

New Zealand has committed to reduce net greenhouse gas emissions to 30% below 2005 levels by 2030 and to zero by 2050.

Emissions Units Traded Volume and Price Changes

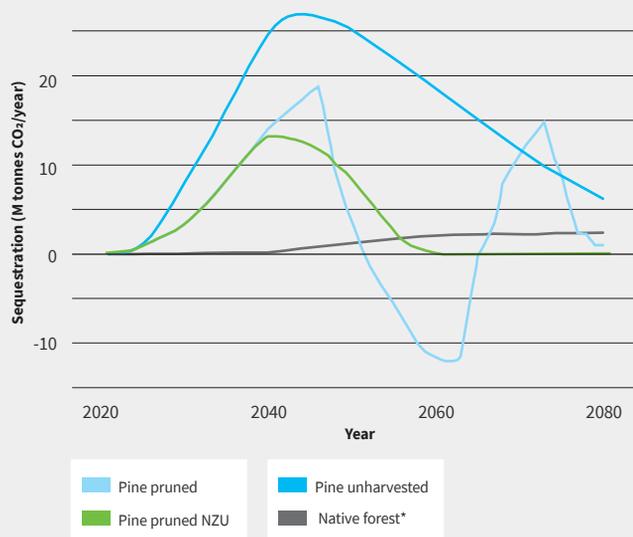
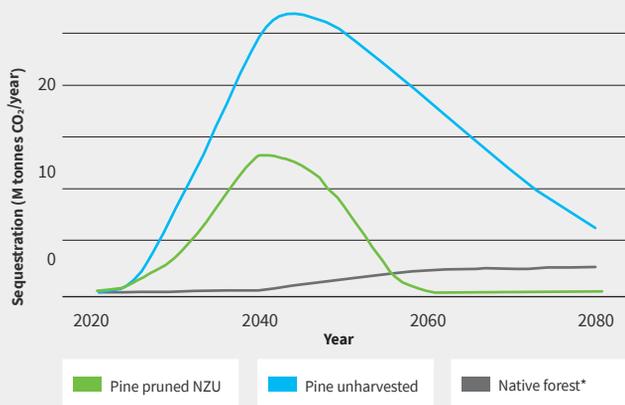


Source 1990 to 2015 National Greenhouse Gas Inventory

Source Emissions Units Traded Volume and Price Changes MPI, Margules Groome

Forestry the Solution in Carbon Zero Pathways

CO₂ sequestration, Climate Change Commission projection outcomes to 2080 from an additional 380,000 ha of new exotic and 300,000 ha of indigenous planting by 2035



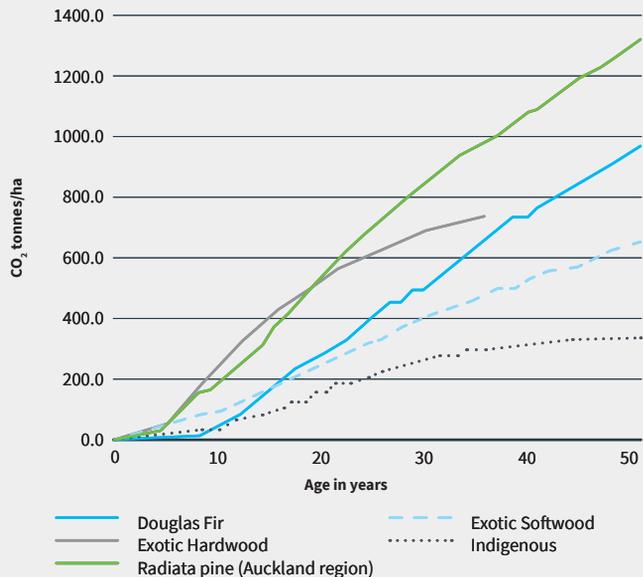
Notes

*Assuming current Ministry for Primary Industries "average" native forest carbon sequestration yield table. This table is highly likely to be revised with new data, as yields vary with site, species and management.

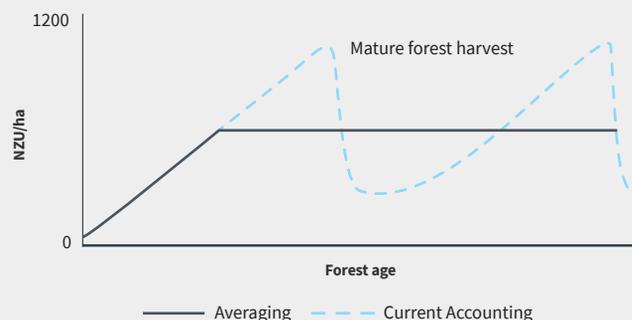
Source CO₂ sequestration, Climate Change Commission projection outcomes to 2080 Euan Mason, University of Canterbury, School of Forestry

Carbon Sequestration

Default Yield Tables of CO₂ Storage for Radiata and Other Tree Species



Carbon accounting practices

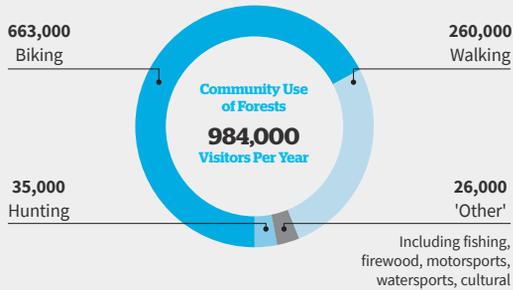


Forests first registered in the ETS between 1 January 2019 and 31 December 2022 will have the option to move to averaging in 2023. Forests registered before 1 January 2019 will remain on the stock change (current) approach.

Source Default Yield Tables of CO₂ Storage for Radiata and Other Tree Species MPI
Source Carbon accounting practices SOPI June 2019

FSC Certified Plantation Forests Contribution to Social, Economic and Environmental Wellbeing

Visitors



Area Certification Statistics



Area under certification
1,167,885 ha



920,589 ha
Area planted in forest



19%
Indigenous areas as part of working forest (weighted average)



9,315 ha
High conservation value areas protected



86 Special Areas
managed by forest companies



Photo by Donna McKenna

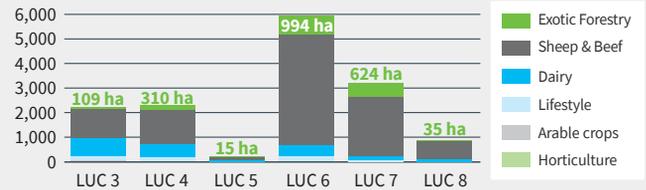


Forest Stewardship Council

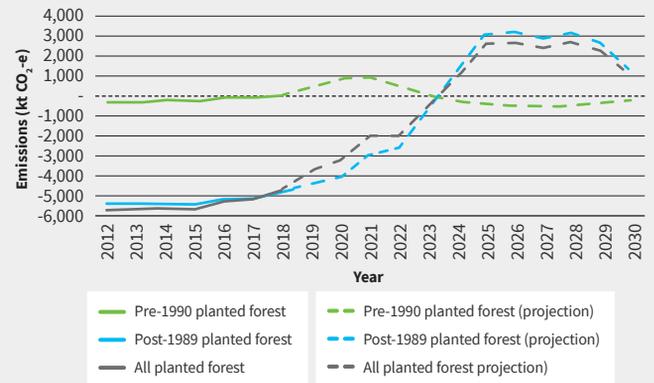
Forestry as a Land Use

Farms Online (15.9m ha) - Land Use by Land Use Capability¹

(1000s of ha)

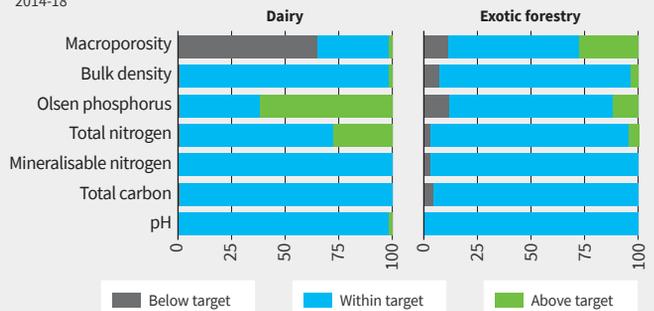


Net emissions and removals from vegetation and soils on sheep and beef farms



Sites within Target Range of Soil Quality Indicators by Land Use by Land Use to ensure best yields and lowest environment damage

2014-18



Notes

¹ The highest Land Use Capability class is 1, with classes 1-4 capable of cultivation, to steep class 8 with little productive capacity.

Source: Farms Online - Land Use by Land Use Capability MPI

Source: Net emissions and removals from vegetation and soils on sheep and beef farms MfE, March 2021

Source: Sites within Target Range of Soil Quality Indicators by Land Use, 2014-18 Manaaki Whenua - Landcare Research

Sector Agreements

Plantation Forestry Rural Fire Control Charter 2021

FOA, FFA, FENZ and Te Uru Rākau New Zealand Forest Service support a charter to encourage working together to develop and promote objectives and actions to improve wildfire management for NZ, and communicate these objectives to our respective members and personnel.

Log Transport Safety Accord 2008 and 2021

FOA, FFA, FISC, FICA, Road Transport Forum and Log Truck Safety Council agree to improve log truck safety for drivers and the public alike, on public and private roads. The parties support compliance with all regulations and codes of practice, recognise the importance of complying with speed limits, disincentivise overloading, back the LTSC Operator Certification Programme and driver training, reduce driver fatigue, promote mechanical improvements for both trucks and loading equipment, identify roading infrastructure priorities, contribute to accurate incident reporting, educate the public on safety awareness and produce a yearly Safety Improvement Plan.

Forest Government Industry Agreement for Biosecurity 2015

The FOA has signed a Government Industry Agreement to protect New Zealand forests from introduced pests, weeds and diseases through sharing of costs and decision making. The Forest Biosecurity Surveillance programme began on 1 July 2016, covering all commercial plantations.

Forest Industry Safety Council 2015

The FOA is participating in FISC as the pan-industry Health and Safety initiative. FISC has an independent cross sector board. FISC's mission is to reduce the rate of serious injury and fatalities in plantation forests, with an ultimate goal of eliminating them.

Cooperation with Farmers 2013

The MOU with Federated Farmers, FOA and FFA is to manage relationships between forest owners/managers and their farming neighbours to promote co-operation and constructive neighbourly relations.

Eliminating Illegal Forest Products 2008

The FOA, WPMA and Pine Manufacturers Association joined NGOs in calling on the New Zealand government, importers, processors, retailers, New Zealand forest and plantation managers and processors of forest and plantation products, to strongly oppose the importation and use of illegally harvested and traded forest products in New Zealand.

New Zealand Climate Change Accord 2007

An agreement between FOA/FFA, the Timber Design Society and eight NGOs acknowledging the contribution of indigenous and plantation forests to mitigate climate change, which also provides a renewable, reusable and recyclable resource. The Accord endorses the principle of polluter pays.

New Zealand Forest Accord 1991 and 2007

The Forest Accord is between forest and timber groups and 10 NGOs to agree on; defining areas unsuitable for forestry, maintaining existing natural forest, recognition of commercial forestry as essential, indigenous forest extraction only on a sustainable basis and new forests not disturbing natural indigenous vegetation.

Terms, Names and Sites

Area and volume

- An average *Pinus radiata* tree yields 2.4 m³ of wood at harvest.
- 1 hectare of 28 year-old *Pinus radiata* contains between 650 and 800 m³ of wood.
- 1 hectare grows up to 28 m³ of wood each year.
- A log truck and trailer carries approximately 30 tonnes of logs.
- A log ship contains approximately 30-35,000 tonnes of logs.
- By weight, the ratio of carbon to oxygen in carbon dioxide is 1-2.66.

Abbreviations

AAU	Assigned Amount Unit
CCC	He Pou a Rangi Climate Change Commission
CER	Certified Emissions Reduction
ERU	Emissions Reduction Unit
FAO	Food & Agriculture Organization of the United Nations
FFA	New Zealand Farm Forestry Association
FGLT	Forest Growers Levy Trust
FICA	Forest Industry Contractors Association
FIEA	Forest Industry Engineering Association
FISC	Forest Industry Safety Council
FOA	New Zealand Forest Owners Association
FSC	Forest Stewardship Council
MfE	Ministry for the Environment
MPI	Ministry for Primary Industries
NEFD	National Exotic Forest Description
NZIER	New Zealand Institute of Economic Research
NZU	NZ Units
OIO	Overseas Investment Office
PEFC	Programme for the Endorsement of Forest Certification
SOPI	Situation and Outlook for Primary Industries
Stats NZ	Statistics New Zealand
WPMA	Wood Processors and Manufacturers Association

Facts & Figures organisation sites

Competenz	www.competenz.org.nz
FAO	www.fao.org/forestry
FFA	www.nzffa.org.nz
FGLT	www.fglt.org.nz
FIEA	www.fiea.org.nz
FISC	www.safetree.nz
FOA	www.nzfoa.org.nz
FSC	www.nz.fsc.org/en-nz
MfE	www.mfe.govt.nz
MPI	www.mpi.govt.nz
NZIER	www.nzier.org.nz
NZFOA	www.nzfoa.org.nz
PEFC	www.pefc.org
Rare Species	www.rarespecies.nzfoa.org.nz
Scion	www.scionresearch.com
Statistics NZ	www.stats.govt.nz
WPMA	www.wpma.org.nz
WorkSafe NZ	www.business.govt.nz/worksafe

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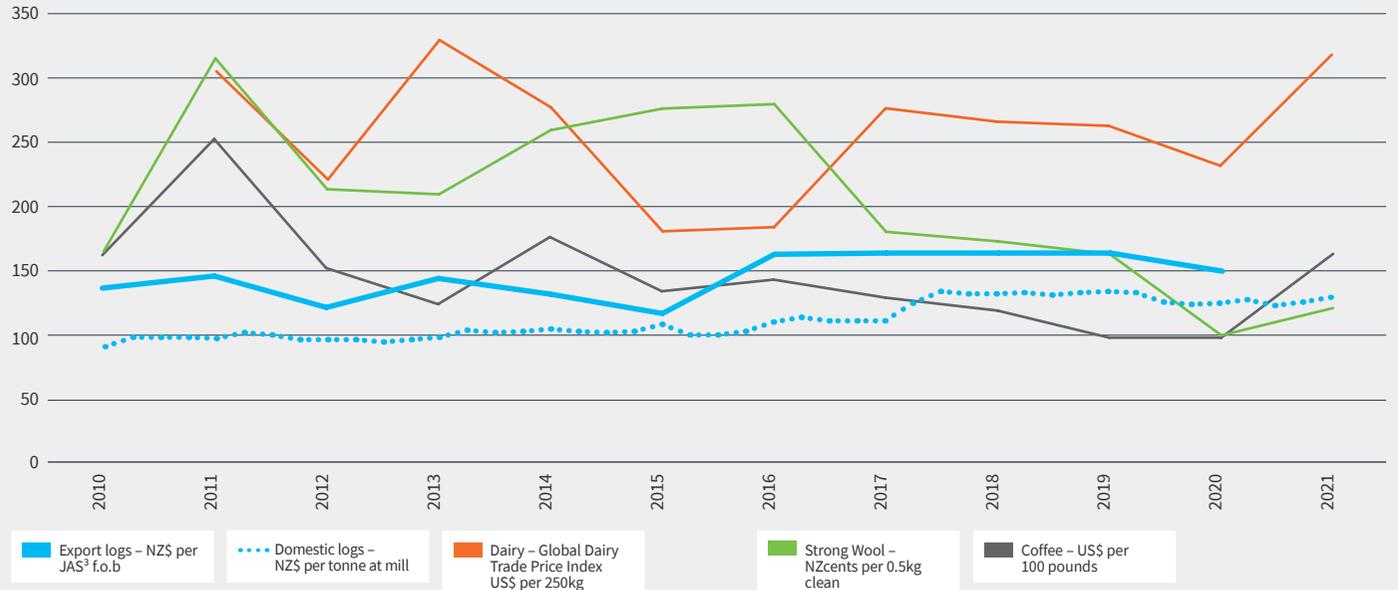
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Log Pricing Data

Log Type, Pricing Point, and Market	Dec-13 Quarter	Mar-14 Quarter	Jun-14 Quarter	Sep-14 Quarter	Dec-14 Quarter	Mar-15 Quarter	Jun-15 Quarter	Sep-15 Quarter	Dec-15 Quarter	Mar-16 Quarter	Jun-16 Quarter	Sep-16 Quarter	Dec-16 Quarter	Mar-17 Quarter	Jun-17 ¹ Quarter	Sep-17 Quarter	Dec-17 Quarter	Mar-18 Quarter	Jun-18 Quarter	Sep-18 Quarter	Dec-18 Quarter	Mar-19 Quarter	Jun-19 Quarter	Sep-19 Quarter	Dec-19 Quarter	Mar-20 ^p Quarter	Jun-20 ^p Quarter	Sep-20 ^p Quarter	Dec-20 ^p Quarter
EXPORT (NZ\$ per JAS m³ f.o.b)																													
Pruned	181-206	171-198	158-190	146-187	165-236	186-199	121-199	189-211	121-228	220-230	204-236	184-207	180-225	185-214	152-213	177-217	184-222	176-222	175-234	153-236	166-228	169-237	182-221	133-195	164-211	138-187	135-216	167-197	151-286
A Grade	137-169	142-165	104-142	110-140	127-169	134-150	81-133	90-133	81-141	119-166	146-169	138-162	141-173	150-180	145-182	151-180	144-168	147-172	154-175	145-172	150-172	158-183	151-172	121-141	144-156	120-146	111-161	125-141	135-156
J Grade	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
K Grade	127-159	133-159	96-137	101-134	117-163	124-143	99-126	91-125	91-135	99-158	136-162	124-157	135-167	142-174	134-177	142-174	137-158	132-165	141-168	133-158	138-162	146-176	143-160	109-137	132-149	112-138	98-149	111-133	126-145
Pulp	119-154	125-140	110-122	92-108	112-135	117-121	65-107	73-110	65-118	55-138	120-143	111-134	125-140	126-149	125-153	123-166	117-148	122-150	130-151	119-152	127-154	135-159	129-144	98-117	116-130	74-122	91-133	102-118	102-131
Average	157	154	132	127	153	147	116	128	123	148	165	152	161	165	166	169	159	166	166	164	167	176	166	136	150	134	151	148	152
DOMESTIC (NZ\$ per tonne delivered at mill)																													
P1	132-156	129-155	131-155	132-154	134-154	139-164	135-170	135-174	135-174	140-187	142-195	140-193	142-186	151-189	155-191	157-193	157-195	149-199	150-197	160-195	164-200	168-196	166-196	163-197	158-198	160-194	165-199	164-194	165-192
P2	121-127	126-126	119-130	125-126	121-130	116-136	116-133	116-133	105-170	129-182	134-188	130-192	102-189	125-142	115-189	120-190	120-190	97-191	126-194	143-195	128-195	132-194	125-195	114-191	128-191	129-192	149-194	115-197	125-198
S1	102-123	98-112	101-111	103-109	98-108	108-112	100-109	100-108	96-109	102-118	104-123	105-123	105-126	114-127	115-136	116-143	116-152	124-159	122-151	122-148	122-148	122-148	122-152	122-143	122-137	118-147	127-137	126-148	131-136
S2	90-113	92-118	91-123	101-110	98-109	96-109	85-109	85-105	85-109	90-115	90-118	80-116	93-120	83-124	117-130	116-135	120-144	115-141	120-141	123-143	120-143	122-144	110-147	115-142	120-132	117-132	110-130	117-125	117-135
L1 and L2	80-113	77-123	78-78	81-87	85-103	97-139	78-95	78-94	78-109	79-130	71-132	74-130	82-138	81-126	83-145	80-130	71-143	89-137	82-137	84-141	90-141	84-141	71-144	63-118	91-118	71-121	82-124	83-120	84-121
S3 and L3	75-102	86-108	90-115	81-100	86-100	88-100	69-96	76-90	69-96	68-106	82-119	69-107	71-112	71-116	71-120	94-138	83-134	109-136	109-129	88-130	111-133	104-132	96-135	84-124	88-113	82-117	100-139	93-112	102-119
Run of bush	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Pulp	46-54	44-55	46-55	45-55	49-54	50-55	31-54	31-55	31-55	31-59	44-59	31-61	40-52	40-61	31-56	31-59	30-59	31-60	31-66	31-77	32-68	50-79	32-64	31-61	30-60	31-75	31-79	31-60	31-75
Average	102	104	102	101	102	108	99	99	102	110	114	111	111	111	126	136	134	134	135	133	135	136	136	127	125	126	129	124	127

Forest, Dairy, Wool and Coffee Prices

For Year Ending June



Notes

¹ Weighted averages have been used from June 2017. Please take care when comparing with previous quarters.

- * Limited response - very small volume traded.
- ** Data not available.

Source Log Pricing Data MPI

Source Forest, Dairy, Wool and Coffee Prices GDT Price Index, International Coffee Organisation, MPI, Westpac Economic Bulletin 2020

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