Timber Marketing Plan

Summary report of public consultation responses

Contents

Introduction

The aim of the consultation was to inform the development of our next Timber Marketing Plan (TMP) which explains our approach to the harvesting and marketing of timber form the Welsh Government Woodland Estate. We have to produce this Plan to help maintain our certification to the UK Woodland Assurance Standard (UKWAS) and to ensure that we deliver against the relevant policy objectives set out in Welsh Government's 50 year strategy for trees and woodlands in Wales "*Woodlands for Wales*".

The formal public consultation exercise ran for a period of 12 weeks, from 10th July 2015 to 2nd October 2015, and involved the following:

- Publication on our website of a consultation document which was organised into six sections and based around a series of proposals about what we want to achieve and how we want to work. Stakeholders were invited to complete a response form and return this to us by email or post.
- A launch event was hold at the Royal Welsh Agricultural Show on 21st July 2015 and an invitation was sent to approximately 100 stakeholders to attend a presentation and Q&A session.
- Direct liaison with key stakeholder groups, including the Ministerial Woodland Strategy Advisory Panel (WSAP) and Confor.

This report summarises the responses to this formal public consultation exercise and how we are responding to the comments that were received. A list of respondents can be found at Annex 1. We would like to thank everyone who took the time to respond to the consultation.

Who responded to our consultation?

A total of 18 responses were received, from a range of organisations and individuals in the forestry sector (see list in Annex 1). These are summarised below. Although the number of responses were low, respondents included trade bodies that represent a wide range of businesses. All responses were received electronically and with a few exceptions, all respondents answered all questions. We acknowledged each response on receipt.

Sector	**Number of responses**	**%**
Public sector	2	11%
Private sector	9	50
Trade associations	2	11%
Third sector	2	11%
Individuals	2	11%
Other	1	6%
TOTALS	**18**	**100.0%**

How we have analysed responses

Questions either asked for descriptive qualitative comments as a response, or asked respondents whether they agreed or disagreed with the proposals we had made and then to provide more detail if they disagreed. However, in many cases, even those respondents that agreed with a proposal provided additional comments so these have also been taken into account.

Key issues

We are considering responses and feedback from the consultation exercise and exploring how these might shape our next TMP. However, it is important that our stakeholders understand the challenges and opportunities we face within the forestry sector in Wales and how these will shape and influence the TMP.

Within the public sector in Wales, it is financially challenging time. It is likely that our Grant in Aid funding will be reduced by £6.1 million in 2016/17, a cut of around 7%. This is subject to confirmation from Welsh Government and final agreement by the Assembly in March. We can expect further cuts like this over the next three years so we need to focus on what we can do with the resources available to us.

We have a programme of service reviews to look at all aspects of our business, which will ask fundamental questions about the kind of organisation we want to be in the future and where we add the most value in delivering sustainable management of our natural resources in Wales. One of these service reviews relates to Land Management, which includes forestry. This review is including assessment of some potential changes which include areas of the business which relate to timber harvesting and marketing. There will be careful evaluation of impacts on policy delivery and the sector and we will keep stakeholders informed of progress.

All of this is taking place against a backdrop of new legislation in Wales which will place new responsibilities on us. The Well-Being of Future Generations (Wales) Act 2015 requires work undertaken by the public sector to deliver sustainable development and well-being benefits and outcomes – for the environment, for people, the economy and our communities. Similarly, the Environment Bill which is expected to receive Royal Assent by spring 2016 will ensure that we manage the natural environment in a joined-up way.

Timber, as a traded commodity, is susceptible to changes in market conditions. Since the consultation was published, there have been changes in the exchange rate and changes in the price of timber, which have implications for our harvesting and marketing decisions, now and in the future. NRW need to maintain flexibility to respond to market conditions and need to understand our decision in the context of the sector in Wales and the wider public benefits delivered from the Welsh Government Woodland Estate. We need to balance this against our business needs which is why we are taking more time to review this area of our business.

UK timber prices are highly influenced by the price that imported timber can be bought for, against timber purchased from home grown supply. One of the major factors in determining price is the exchange rate of the pound against the importers currency - Swedish Krona, the Euro and to a lesser extent the Canadian Dollar. Another factor that influences demand is the performance of global and UK economies; strong growth usually gives a strong demand for timber.

Over the last few months there has been a marked reduction in global growth (especially in China) and a slowdown or stagnation in other influential economies, including Germany and the UK. The UK is also experiencing a protracted period of a relatively high value pound against importing currencies. These factors are putting

British timber producers under pressure after a very buoyant period in the previous 18 months.

In summary, we are not yet in a position to explain in detail our future direction of travel. We are committed to being as transparent and open as possible, but do not currently have answers to all the questions and issues that have been raised as part of the consultation exercise.

Results and summary of responses to questions

Section 1: How we market our timber in line with a set of clear objectives (Q1-Q4)

1: Do you agree with our proposal to retain the existing aims and objectives from the current TMP?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	5	8	2	1	1
% *	**27.8%**	**44.4%**	**11.1%**	**11.1%**	**7.7%**

* % out of those who responded to this question (total no. responses to this question was 18)

Q2: If you disagree with the current aims and objectives please tell us what you think is missing or should change.

There was strong support for our current aims and objectives which were detailed in the Consultation Document. However, a range of suggestions were made to change or improve them, which included:

- Strengthening them to better reflect the needs of the third sector
- Making them more business focused
- Including a link to the timber use hierarchy
- Improving the transparency of our sales process and financial information about how the WGWE is performing.
- Ensuring that they do not conflict with other Welsh Government priorities
- Ensuring that there is flexibility within the period of the plan.

How we have listened

We plan to retain our existing aims and objectives, but modify them slightly to reflect the comments received (many of which relate to cross-cutting issues that were addressed in subsequent questions within the consultation document).

Q3: Do you agree with our proposal to introduce a new statement alongside our objectives that specifically deals with significant change to our timber harvesting and marketing intentions?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	4	9	3	1	0
% *	23.5%	52.9%	17.6%	5.9%	0.0%

* % out of those who responded to this question (total no. responses to this question was 17)

How we have listened
Given the positive response to this question, we plan to introduce a new statement alongside our objectives that deals with managing significant change to our timber harvesting and marketing intentions.

Q4: Please tell us what an acceptable period of notice would be and if you have any recommendations for future strategic change.
Comments relating to an acceptable period of notice were variable, and many respondents stated that appropriate timescales would depend on the nature of the change. Suggestions ranged from quarterly to 5 years, but 12 months was most frequently cited. Some respondents acknowledged that issues such as plant health and disease management may require an urgent response.

Few respondents made recommendations for future strategic change. Those that did suggested that:

- NRW should be more responsive to market conditions and adjust its approach accordingly to avoid over or under supply which may depress or raise market prices
- Opportunities for more vertical integration should be explored to deliver better value for money, i.e. the woodland estate should be managed as an integrated whole rather than a series of separate activities.

How we have listened
We plan to introduce a period of notice of 12 months to notify our customers of changes that affect our approach to harvesting and marketing, unless circumstances beyond our control, such as a plant health and disease management or changes in our funding settlement, dictate that a shorter period is necessary. If this happens, we will communicate any changes to our stakeholders at the earliest opportunity to give as much notice as possible.

Section 2: How we tell you about the levels of timber availability, intended timber production for the period and how this will be published (Q5, Q6)

Q5*: Do you agree with our proposal to increase the level of timber production from the WGWE?*

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	6	6	4	2	0
% *	33.3%	33.3%	22.2%	11.1%	0.0%

* % out of those who responded to this question (total no. responses to this question was 18)

Q6*: If you disagree with our proposed level of production please tell us why and what you would change.*
Support for our proposal to increase the level of production was mixed, but more positive than negative. A range of comments and suggestions were made but they broadly related to three key issues:

- The level of production should be influenced by, and be more responsive to, market factors, i.e. decrease volume if market demand and prices are low

- The level of production must be sustainable in the longer term so there is investment security for the timber industry as a whole, and must also be considered alongside wider strategic issues such as the projected supply dip in the 2030's and the need to create more productive woodland.
- Given that forests deliver a range of environmental, social and economic benefits – should production level (volume) be the primary performance measure? Would it be better to look at other targets to "maximise value" in the widest sense?

How we have listened
We recognise the importance of this issue for our customers and suppliers. We are carefully considering the comments and feedback received, taking into account the implications of wider strategic issues and the challenging funding situation.

Section 3: What our method sales are or could be (Q7-Q24)

Q7: Do you agree with our rationale for offering Long Term Contracts (LTCs)?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	5	9	1	3	0
% *	27.8%	50.0%	5.6%	16.7%	0.0%

* % out of those who responded to this question (total no. responses to this question was 18)

Q8: If you disagree, please tell us why and what you would change.
The majority of respondents agreed with our rationale for offering LTCs. Those that commented, highlighted the following issues:

- LTCs should contain community benefit clauses to encourage third party contracting with the community sector
- There should be more transparency surrounding LTCs, e.g. what benefits they have stimulated and whether they have delivered value for money.
- LTCs are necessary for investment but they reduce NRW's capacity to react to market forces. They should be capped at the lower range (40%).
- Opportunities should be examined to provide stability and security for companies that do not have a LTC.

How we have listened
We recognise that LTCs are important for the sector as a whole and are currently reviewing our approach. We are committed to engaging with the sector and being more transparent about existing and future LTCs, including the benefits they deliver.

Q9: How could we better use LTCs in our management of the WGWE to stimulate the wider benefits outlined in *Woodlands for Wales, i.e.* stimulate the transfer of greater benefit across the Welsh Forest Resource and forest sector for the economy, people and environment?
This question invited comments and ideas from respondents which have been summarised into a number of themes:

- There should be greater transparency surrounding LTCs and the investment they are stimulating in the sector

- Joined-up opportunities should be explored to offer LTCs covering the management of the estate as a whole. This would be compatible with the move towards forest design plans and stimulate investment in all sectors.
- There should be more of a focus on conifer / commercial softwood crops that the market needs.
- LTC provision should extend to all areas of the supply chain, e.g. haulage companies and processing plants, to make it more sustainable
- The system of applying should be easier and less onerous – a more complex application process favours larger companies.
- LTC's (especially standing sales) should be made available in smaller lots and accessible to small scale businesses (including social enterprises). This has the potential to greatly increase delivery of direct benefit to local economy, people and environment through reciprocal benefits.
- Consideration must also be given to attract new entrants to the industry through supporting apprenticeships and continued learning opportunities.

How we have listened
We are interested in the idea of getting better value from LTCs by broadening their scope to include for example civil engineering and/or restocking opportunities and plan to pilot this approach (known as vertical integration) during the next plan.

We will be more transparent about the benefits that LTCs deliver, in terms of the investment and opportunities they stimulate in the sector, by reporting and communicating these benefits on an annual basis following our annual performance management review of LTC contracts.

Q10: Do you think we should offer some smaller volume LTCs to suit smaller or emerging harvesting businesses, to act as a proving ground as they grow?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	5	9	3	0	1
% *	27.8%	50.0%	16.7%	0.0%	7.7%

* % out of those who responded to this question (total no. responses to this question was 18)

How we have listened
We are very interested in proposals for micro and small LTCs - particularly where there are niche market and value gains – and are focussing our plans around broadleaf thinning. However, with the challenging funding situation, the issue of overall affordability in relation to offering micro and small LTCs will need to be a focussed consideration.

Q11: Do you agree with our proposal to retain LTC commitment within the range of 40% to 60%?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	3	8	1	5	1
% *	16.7%	44.4%	5.6%	27.8%	6.7%

* % out of those who responded to this question (total no. responses to this question was 18)

Q12: If you disagree please tell us why and what you would change
Variable comments were received in response to this question with respondents supporting ranges of 30-60%. Those that supported the higher end of the range cited the following reasons:

- Necessary to ensure continuity of supply and meet market demands
- Necessary to stimulate investment in the whole supply chain.

Those that supported a lower range gave the following reasons:

- A lower range gives NRW more flexibility to react to market conditions of supply and demand
- Provides more flexibility to respond to unforeseen circumstances, e.g. plant diseases.

How we have listened
We are currently reviewing our approach to LTCs for the period of the next plan. As stated in relation to Q10, smaller volume LTCs may be considered in the future to address market failures or where wider community benefit gains are achievable.

Q13: Do you agree with maintaining the status quo (broadly a 50:50 mix) on Roadside versus Standing Sales?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	6	3	2	6	0
% *	35.3%	17.6%	11.8%	35.3%	0.0%

* % out of those who responded to this question (total no. responses to this question was 17)

Q14: If you disagree please tell us why and what you would change
There was mixed support for maintaining the status quo (broadly a 50:50 mix). The following comments were received from those respondents that disagreed with the proposal:

- There should be a higher percentage of standing sales as this is where the maximum benefit for investing in the supply chain can be achieved.
- Too much timber is sold roadside – if there is no market demand for this timber then it is stored by the roadside, losing weight and value.
- There should be a higher percentage of Standing Sales as this would give the customer better control over the log supply to the mill

- There should be regional flexibility in the split between Roadside and Standing Sales.

How we have listened
In accordance with the comments received, we are reviewing our approach to Direct Production (which results in roadside sales).

Q15: Do you agree with our intention to continue with four electronic timber sales annually?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	5	5	3	3	1
% *	29.4%	29.4%	17.6%	17.6%	8.3%

* % out of those who responded to this question (total no. responses to this question was 17)

Q16: If you disagree please tell us why and what you would change
There was a mixed response to this question, but more positive than negative. Comments received from those respondents that disagreed are summarised below:
- E-procurement processes are challenging for social enterprises and SMEs – more support is needed. The size and composition of parcels is key.
- The current auctioning system promoted by NRW needs to be improved to deliver better returns.
- It's not clear how will these arrangements will work if small scale LTCs are allocated which might be based on client nominated coupes / parcels of land.

How we have listened
We are in the process of developing a new timber e-sales system. The specification for this system will allow flexibility in how many electronic timber sales we offer annually. Our intention is to offer a wide range of parcels, more frequently, through an open market process, and we aim to simplify sale methods where possible. We will ensure that SMEs and social enterprises are supported to access electronic sales - either directly through our business support team or via colleagues in agencies such as Forestry and Farming Connect.

Q17: Do you agree with these improvements to the information we publish in support of sales events?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	8	8	2	0	0
% *	44.4%	44.4%	11.1%	0.0%	0.0%

* % out of those who responded to this question (total no. responses to this question was 18)

Q18: If you disagree please tell us why and what other improvements you would like to see
There was a very positive response to this question and proposed improvements to the information we publish in support of sales events was welcomed.

How we listened
We will make improvements to the information we publish in support of sales events. These will include publishing on our website the intended locations and volumes by thinning and clearfell that we are committing to for each of the scheduled sale points.

Q19*:* Do you agree with our proposal to continue to offer up to some directly negotiated sales for niche markets?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	6	9	2	0	1
% *	33.3%	50.0%	11.1%	0.0%	8.3%

* % out of those who responded to this question (total no. responses to this question was 18)

Q20: If you disagree please tell us why and what you would change.
There was a very positive response to this question and our proposal to continue to offer up some negotiated sales to niche markets.

How we have listened
We intend to continue to offer up some negotiated sales to niche markets and will ensure that contact and supporting information is made available on our website.

Q21: Do you agree that an individual transaction value limited to £5,000 is correct?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	1	3	5	6	3
% *	5.6%	16.7%	27.8%	33.3%	17.6%

* % out of those who responded to this question (total no. responses to this question was 18)

Q22: If you disagree please tell us why and what value you would change it to
There was a mixed response to this question, with the majority of people dis-agreeing. The reasons given and the suggestions for alternative values were also variable, with some suggesting that the figure of £5k was too small to attract SMEs and allow growth in this sector, whilst others felt £5k was too ambitious a venture for most small businesses. Alternative values of £10-£20k were proposed.

How we have listened
We are considering a range of options. Given that these sales are negotiated, and not on the basis of an open-market competitive process, it is important that we set an appropriate value.

Q23: If we offered electronic auctions in the future, is this something you would be interested in?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	5	6	6	0	0
% *	29.4%	35.3%	35.3%	0.0%	0.0%

* % out of those who responded to this question (total no. responses to this question was 17)

How we have listened
Overall there was a positive so this is something we will progress. We will ensure that SMEs and social enterprises are supported to take part in auctions, either directly or via colleagues in agencies such as Forestry and Farming Connect.

Q24: What type of service would you want if we offer a dedicated volume from programmed sales as 'customer negotiated', for example via Woodlands and You? We want to hear your ideas
There were many comments and ideas in response to this question. A summary around themes / topics is given below.

- There should be more 'local /area officer' involvement within NRW to support greater engagement with, and more contract opportunities for, local communities and businesses.
- Coupes should be considered for sale on the basis of the 'best use of timber / more innovative bid solutions' rather than just financial monetary return, particularly in relation to the carbon hierarchy and realising local benefits.
- There should be a greater focus on woodfuel / small craft products / non-forest product markets in relation to the community sector to stimulate growth.
- The community enterprise offer should not be limited to uneconomic sites – this is unfair and inequitable.
- There should be more access to account managers / representatives to improve procurement processes and contract management, with more flexibility to respond to socio-economic changes in the marketplace.
- More work is needed to tease out the relationship between Woodlands & You and the TMP. There should be one procedure for accessing a LTC standing sale agreement over a parcel of land for both social and private enterprises. Woodlands & You can then be used for additional permissions.
- The allocation of a proportion of volume from the harvesting programme would perhaps be the best way of providing for community use. A start of 5,000 m3 per year with a ceiling of 20,000 m3 sounds reasonable.
- Pricing arrangements designed to promote capital investment used on large scale long term standing sales should also be considered for small scale businesses and social enterprise. These often have significant difficulties obtaining start-up capital.

How we have listened
We are currently considering the helpful ideas and suggestions that were made, and our looking at the options available to move these forward via our TMP and/or Woodlands and You (our scheme to facilitate access to land we manage for activities, events, projects and surveys).

Section 4: How we set out our approach to "carbon smart" sales of our timber products (Q25, Q26)

Q25: Do you agree that we should continue to follow our 'preferred hierarchy of use' to help reduce Wales' carbon footprint?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	7	7	2	1	1
% *	38.9%	38.9%	11.1%	5.6%	9.1%

* % out of those who responded to this question (total no. responses to this question was 18)

How we have listened
There was a very positive response to this question so we intend to continue to follow our "preferred hierarchy of use" in our next plan.

Q26: What more can we do to get maximum benefit from the WGWE timber resource in relation to carbon management?
There were many comments and ideas in response to this question. A summary around themes / topics is given below.

- Help with the development of different uses for used end products.
- There should be a greater focus on planting commercial conifer crops, for rapid carbon absorption.
- Better cutting specifications to get "best value for money" for each crop
- The timber hierarchy principle should apply in all scenarios, taking a "life-cycle" approach
- Carbon should be valued as a forest product that can be traded - this would provide another income from woodlands that could stimulate woodland creation.
- Some financial incentives out with NRW control militate against the desired hierarchy of use e.g. industrial RHI encourages wasteful use of wood for heating.
- Need to think about how to stimulate long-life uses of its timber, e.g. for structural purposes.
- The case for production and local use of high quality firewood is understated
- NRW could consider including a matrix to minimise travelled miles from forest to mill with a strict policy on revenue versus carbon footprint.

How we have listened
We are considering the range of helpful comments and ideas that were received and are looking at how we might address them in our next Plan.

Section 5: How we publish our sales performance figures

Q27: Do you agree with our proposal for retrospective sales performance figures to be included in our Annual Sales Plan and tell us what you would like to see included.

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	3	10	2	1	1
% *	17.6%	58.8%	11.8%	5.9%	7.1%

* % out of those who responded to this question (total no. responses to this question was 17)

Overall there was a very positive response to our proposals for retrospective sales performance figures to be included in our Annual Sales Plan. The following suggestions were also made:

- Information should be broken down into standing and roadside, products (e.g. logs, bars, fencing, and biomass) and some species separation.
- The retrospective performance figures against lot should contain:
  - Number of bids
  - Bid vs NRW valuation
  - Top bid
  - Mean bid.
- There should be information on whether sites are making a profit or a loss, and regional price differences.

How we have listened

We are committed to reporting retrospective sales performance figures and are already working with the Forest Sector Business Group to agree a way forward.

Q28: What would your measures of success (KPIs) be in delivering our future TMP?

There were a number of very detailed responses to this question, which are summarised below:

- KPI around sales to SMEs and community enterprises, and tracking of social multipliers to capture the multi-benefits of forest production and timber use
- Breakdown of total harvested figure per annum into products, not just categories, and a clearer picture of the recovery rate for each product against the annual harvested programme.
- Information on the accuracy of NRW's valuation against market price achieved.
- Overall focus must be on delivering what is set out in the Sales Plan, on time.
- Best financial benefit to NRW and therefore the people of Wales. Aligning with the key indicators in Woodlands for Wales.
- The reporting requirements under the WBFG Act and proposed Environment Bill, and their relevance to the TMP should be considered.
- NRW is charged with managing a public asset and thus financial transparency is paramount.

How we have listened

We intend to work with the Forest Sector Business Group to consider the options, taking into account what we are able to provide and what the sector thinks would be useful. We hope to develop our KPIs to better reflect the multi-purpose benefits that forests deliver (as reflected in the *UK Forestry Standard* and the *Woodlands for Wales* strategy).

Section 6: What our customer service standards are or could be (Q29)

Q29: Do you agree with our proposal that our new TMP will bring together all of the relevant commitments and information for our timber customers and contractors?

	Strongly agreed	Agree	Neither agree or disagree	Disagree	Strongly disagree
Number of responses	3	7	3	3	1
% *	17.6%	41.2%	17.6%	17.6%	7.1%

* % out of those who responded to this question (total no. responses to this question was 17)

There was a mixed response to this question, but more people agreed than disagreed.

How we have listened

We will use our TMP in conjunction with our Customer Care and Service Standards to bring together all relevant harvesting and marketing commitments and information for our timber customers and contractors. We believe this approach will be compatible with the Forestry Commission Timber Customer Charter which covers England and Scotland, offering continuity for businesses working across the UK.

Finally

Q30: Are there any further comments you would like to make?

A range of helpful comments were received covering issues such as:

- the use of electronic data processing for security and delivery
- the provision of shared training opportunities across the public and private sector to promote best practice
- the future of the forest estate so that customers have the confidence to invest
- whether NRW has on overall policy on “sales” which covers other products beside timber.

Next steps

Work is ongoing to consider all the comments that were received. It is now likely that we will publish a one year Interim Timber Marketing Statement for 2016-17, and then a five year Timber Marketing Plan for the period 2017-22. The main reason for this is that we cannot commit to a five year plan until the service reviews have been completed (see Key Issues section for more information).

To close…

Thank you again for your interest in how we deliver our work for Wales – and for reading this summary report on the results from our public consultation.

We wish you well with your areas of interest and work, and hope you will continue to engage with us wherever our areas of work coincide.

Annex 1 – List of respondents

We had 18 responses in total to our consultation on proposals for our Timber Marketing Plan. Below is a list of organisations that responded. We noted on our consultation response form that we would not release the names of individuals who responded. There were also five requests from organisations that asked that their response remained confidential.

Response Reference	Organisation
TMP001	Black Mountain Woodfuels
TMP002	Golygfa Gwydyr
TMP003	Bedmax Ltd
TMP005	UK Forest Products Association
TMP006	ETC Sawmills Ltd
TMP008	Confor
TMP010	Woodland Strategy Advisory Panel (WSAP)
TMP012	Tilhill Forestry
TMP014	Flintshire County Council Coed Cymru Officer
TMP016	CLA Cymru
TMP018	Institute of Chartered Foresters