TFFPN

N-NW Forestry Hub Outcomes Report

WLF ACCOUNTING & ADVISORY

1 Critical Constraints to Growth

Constraint	Number of Votes
Existing infrastructure; ports and rail integration to port	21
Lack of clarity in carbon trading	16
Land availability – integration with other crops and land users	15
Access to land (suitable land, suitable size)	14
Clear pathways for training for skills required, workforce development and career pathways	13
Access to skilled operators	12
Confidence; growers, harvesting (investment in skills), equipment, etc.	12
Incentives for landowners to grow trees	11
Lack of an investable business model for smaller forest owners	11
Skills and labour force	10
Cost of entry; costs, approvals and lending/finance	10
Economic incentive for private growers	9
Skills – employer of choice	9
Social licence	7
Artificial limitations on carbon credits (e.g. 600m rainfall rule, spp limitation, short vs long rotation)	6
Workforce development plan	4

Constraint	Number of Votes
Lack of good alignment between agriculture and forestry growth policies (and energy and waste management and climate change and fire management policies)	4
Available land at scale	4
Infrastructure bottlenecks e.g. ports	3
Investment cost with long cycle payback	3
Lack of access to skilled forestry (e.g. professionals who can help with establishment of plantation)	3
Lack of mechanisms (that doesn't distort market)	3
Lack of certainty for R&D funding	3
Social licence	3
Port access/costs/efficiencies	2
Costs of Exporting	2
Lack of investor confidence (return not realised until much later)	2
Pressure on production costs	1
Access to productive land for planting	1
Infrastructure	1
Lack of land available for growing more resource	1
Green field resource establishment → lack of incentive – needs annual income stream to see any appreciable gains in plantings; carbon credits, reverse mortgages, partnerships/leases and tax breaks	1
Cost competitiveness – value adding	1
Regulatory framework and constraints	1

Constraint	Number of Votes
Land availability – access	1
Understanding the value of trees, in agriculture; improved productivity on crops/livestock	1
Building the social license	1

Constraints with zero votes:

- Market certainty/risk
- Freight costs (especially across the Bass Straight)
- Education about risk of forest as part of balanced portfolio for small groups
- Cost of renewables (products/energy)
- Perception that forestry is risky
- Capital
- Regulation and over-regulation
- Cost of compliance and cost of harvesting small woods
- Aging workforce – something stopping young people entering the forestry sector
- Red tape
- Cost competition – supply chain

2 Priorities Enabling Growth

Priority	Number of Votes
Develop pathway planning in schools, sell the idea of great jobs in an innovative industry, align to education pathway cadet, cert. IV, diploma, association degree, degree	23
Access to land/business models – cooperation → shareholder model, economies of scale needed, governance models to allow all sizes to participate	20
Land and incentives – communicate with government e.g. Marry carbon (ERF) with 1 billion tress → upfront carbon payments to cover establishment	19
Supply chain capacity and efficiency; port quick wins	19
Portability of plantation investment in conjunction with landowners with removal of artificial constraints	16
Land suitability mapping, what is possible? Incentivise growers; CO^2 clarity, funding models, reforestation grant, agriculture loans	13
Carbon credits → consistency in eligibility, remove 600mm rule, remove spp restriction, remove long/short rotation inequity → replant crop should be eligible	12
Skills – culture, attracting and retention skills, pathways, workforce plan	9
Career pathways/workforce development plan (short term)	8
Simplified deeming scheme to reduce red tape → particularly for small scale farmers	8
Policy/over-regulation; 2R & 3R rotation, small woodlots, recognition of property plans	6
Clear pathways on training – be more strategic, target gaps, certificates not as important as key skills	6
Acknowledging biomass as eligible under RET for thermal (to create market pull)	5
Burnie port – equitable and infrastructure review; drudging, loading	4
Simplify processes where incentives are provided → lower reg & green tape	4

Priority	Number of Votes
Pooling of land base by an independent aggregator to enable scale	4
Understand best practice public policy	3
Access to skilled operators, embrace diversity – don't preclude 30-50% of population on gender/ race ect.	2
Industry support needed → first right of refusal to buy timber at harvest, out grower schemes	2
Policy change to encourage planting (long term)	2
Knowledge transfer to landowners; farm forestry tools – further development	1
Rail integration with ports	1

Priorities with zero votes:

- Unlock landscape level benefits by reducing micro-level "rules"
- Reverse mortgage scheme – drawing down equity overtime
- Make exporting easier → easier access to market
- Reviewing port efficiencies and coastal shipping efficiencies e.g. cross collaboration across different industries to drive down costs of shipping
- Promote forestry as complementary enterprise with agriculture use → property management planning
- Climate friendly policies – sustainable food fibre (carbon) productions (carbon trading relationship to production)
- Part of economic package to attract private landowners (Develop natural capital accounting

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Move Forward