

UNECE Timber Committee Market Report for Ireland 2010

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Table of Contents

1.0	Irish economy – an overview	1
	2009	1
	2010 - 2011	2
2.0	Market drivers	3
2.1	Construction activity	3
	2.1.1 Irish housing output	3
	2.1.2 Repair, Maintenance and Improvement (RMI)	4
2.2	UK construction market	5
	2.2.1 The UK market for forest products	5
2.3	€/£ Exchange rate	6
2.4	Demographics	7
3.0	Policy measures	7
3.1	The National Development Plan (NDP); 2007-2013	7
	3.1.1 Research, Technological Development & Innovation (RTDI)	7
	3.1.2 Forest research	8
3.2	Support for afforestation	8
	3.2.1 Afforestation grants and premiums	8
	3.2.2 Forest Environment Protection Scheme (FEPS)	8
	3.2.3 Native woodland scheme	9
	3.2.4 Forest roads scheme	9
3.3	Premium payments	9
3.4	Energy policy and support measures	9
	3.4.1 Biomass and the National Development Plan (NDP); 2007-2013	9
	3.4.2 Energy White Paper	10
	3.4.3 Sustainable energy sub-programme	10
	3.4.4 National Renewable Energy Action Plan (NREAP)	11
	3.4.5 Promoting wood energy	11
	3.4.6 Energy Performance of Buildings Directive (EPBD)	14
	3.4.7 Meeting biomass targets	14
3.5	National climate change strategy (2007 – 2012)	15
4.0	Developments in forest products markets	15
4.1	Irish roundwood harvest	15
4.2	Private forest estate	16
4.3	Private forest forecast	17
4.4	Forecast of roundwood supply and demand	18
4.5	Sources & uses of wood fibre	18
4.5	Wood residues	19
4.6	Certification	19
	4.6.1 Certified forests	19
	4.6.2 Certified forest products	20
4.7	Value added products – wooden furniture	20
4.8	Trade in forest products	20
	4.8.1 Sawn timber	21
	4.8.2 Wood Based Panels (WBP)	25
	4.8.3 Pulp & paper	26
	4.8.4 Builders merchanting	26
	4.8.5 Wood biomass	26
6.0	New developments	28
6.1	Coillte biomass energy	28
6.2	Coillte wind energy	28
6.3	Forest health – sudden oak death	29
6.4	Forestry review	29
6.5	Glennon Brothers secures its first French export order	29
6.6	Imperative Energy	29

6.7	Irish Timber Growers Association (ITGA) timber sales system	30
6.8	Meditate MDF now CARB 2 compliant	30
6.9	Safety in forestry operations	30
6.10	SmartPly Site Protect.....	30
6.11	UK promotional campaign for Irish sawn timber	30
6.12	Wood Fuel Quality Assurance (WFQA) scheme	31
7.0	Tables	32
7.1	Economic Indicators	32
7.1.1	An Economic Overview of the Irish Economy (2001 – 2010).....	32
7.1.2	Irish construction output (2000 – 2010f).....	33
7.1.3	Forest products production in Ireland (2005 – 2011f).....	34
7.1.4	Irish Timber Imports and Exports (2007 - 2009).....	35
8.0	References	36

Tables

Table 1:	OECD forecast for import growth (%) in key markets (2009 – 2011)	3
Table 2:	House completions in the Republic of Ireland (1990–2011f)“	4
Table 3:	RMI output in the Republic of Ireland at constant 2007 prices (2005 – 2009)	5
Table 4:	UK imports of sawn timber & panel products by volume and year (2005 – 2009)	6
Table 5:	Historic & forecasted €/£ exchange rates ‘	6
Table 6:	Combined Heat and Power (CHP) output targets to 2020.....	11
Table 7:	Uptake of the GHS 2009 – 2010	12
Table 8:	REFIT tariffs under the new SEAI CHP/AD CHP.....	14
Table 9:	Renewable energy as a percentage of gross electricity consumption	15
Table 10:	Roundwood available for processing in the Republic of Ireland (2007 - 2009)	16
Table 11:	The projected demand for roundwood on the island of Ireland in 2020‘	16
Table 12:	Forecast harvest from the Irish private forest estate (2009 to 2028)	17
Table 13:	Sources of wood fibre in the Republic of Ireland (2007 - 2009).....	18
Table 14:	Uses of wood fibre in the Republic of Ireland (2007 -2009).....	19
Table 15:	Wood residue output for the Republic of Ireland (2007 - 2009)	19
Table 16:	The value of wooden furniture imports & exports in Ireland (2007 - 2009)	20
Table 17:	Irish timber trade (2007 - 2009) ‘.....	21
Table 18:	Irish sawn timber market size (2006–2009)	22
Table 19:	Key sawmills operating on the island of Ireland by size and location	22
Table 20:	Roundwood available for processing in the Republic of Ireland (2007 -2009)	22
Table 21:	Exports of sawn softwood from the Republic of Ireland (2000 – 2009)	23
Table 22:	Top 10 softwood exporters to Ireland (2007 – 2009)	24
Table 23:	Top 10 hardwood exporters to Ireland (2007 – 2009).....	24
Table 24:	Total output of the wood panel sector in the Republic of Ireland (2007 – 2009).....	25
Table 25:	Wood based panel manufacturers in the Republic of Ireland	25
Table 26:	The value & volume of panel product exports from the Republic of Ireland (2007 - 2009)	25
Table 27:	Feedstock used by the wood biomass energy sector in Ireland (2007 - 2009)	27
Table 28:	Energy output of the Irish wood based biomass sector (2007 – 2009)	27
Table 29:	Existing biomass fuelled CHP output in the Republic of Ireland (2009)	28
Table 30:	Irish timber imports and exports (2007 - 2009)	35

1.0 Irish economy – an overview

2009^{1,2,3}

The Irish economy is experiencing a severe contraction as large domestic imbalances are un-wound in an environment of global recession and financial crisis. By the second quarter of 2009, Ireland's Gross National Product (GNP) had fallen by 13.6% from its peak. By July 2009, Irish industrial output was 21% below its peak.

Ireland's economy faced a series of severe challenges during 2009. The domestic difficulties associated with the domestic property crash were added to by a global economic crisis; a financial crisis; difficulties in the public finances and by unfavourable exchange rates. Domestic demand collapsed during 2009. Building and construction output fell by 34%; housing output was down 40%, while activity elsewhere in the construction sector declined by 20%. In 2009, the number of new houses completed halved from 52,000 in 2008 to 26,420⁴.

The strength of the euro against both the dollar and sterling posed a significant challenge for exporters and for the economy generally. Sterling averaged 89 pence against the euro during 2009 compared to an average value of 68 pence in 2007. The 24% swing in the exchange rate made it very difficult for Irish business to sell into the UK and in many cases to compete domestically against cheaper UK imports. The forest products sector was particularly exposed to these difficulties. Over the period 2006 to 2008, 99% of the sawn timber and 66% of the panel products which were exported from the Republic of Ireland were sold in Northern Ireland and in the UK⁵.

Rising unemployment; wage reductions and tax increases all impacted negatively on disposable income. A lack of consumer confidence meant that households substantially increased their savings rate during 2009. According to labour force survey data, in 2009, Ireland saw its first negative net migration since the mid-1990s. This reflects the effects of the economic crisis, which had begun in the first half of 2008.

On December 9th the Irish Government set out a severe austerity budget for 2010. This budget foresees the general Government budget balance stabilising in 2010 at 11.6% of GDP compared with 11.7% in 2009. This budget assumes that GDP will decline by 1.3%.

By the third quarter of 2009, Ireland's GDP had contracted by more than 10%. The Irish Economic and Social Research Institute⁶ expects a further shrinking in 2010. Only in 2011 is a return to growth expected. This exceptionally deep downturn is attributable to contracting domestic demand, led by a collapse in construction activity and by shrinking consumer spending. It has been exacerbated by falling exports, owing to the global recession. Key highlights of the Irish economy in 2009 include:

- In 2009, the output of the Irish economy declined by 7.6% when measured in real GDP terms.
- Real GNP declined by 1.7%.
- Consumer price inflation (CPI) for 2009 was minus 4.5% compared to 4.1% for 2008.
- There were 1,922,400 people in employment in the third quarter of 2009, a year-on-year fall of 184,700 or 8.8%⁷. At year end, the Irish rate of unemployment stood at 11.8% up from 6.3% in 2008⁸.
- In 2009, Irish exports declined in volume and value by 4.1%.
- The collapse of the housing market is at the heart of the recession and the unwinding of Irish economic imbalances. The fall in residential construction output has already subtracted around 10% from the level of Gross National Income (GNI). The negative effects from the correction are much wider felt.
- On an annual basis, investment in housing fell by 26% in 2009, while house completions amounted to 26,420. This was a drop of 72% from its peak in 2006.
- In 2009, new residential construction accounted for 3.4% of GNP compared with 7.3% in 2008 and approximately 11.2% in 2007⁹.

¹ ESRI Quarterly Economic Commentary, Summer (2010); www.esri.ie

² OECD economic surveys: Ireland, 2009

³ http://store.eiu.com/product/50000205IE.html?ref=product_detail_list_Country_title

⁴ Source: Irish Business Employers Confederation (IBEC); www.ibec.ie

⁵ Source: Trade statistics, Central Statistics Office; www.cso.ie

⁶ www.esri.ie

⁷ Economist Intelligence Unit (EIU) Ireland report (2010)

⁸ Unemployment figures expressed as a percentage of the labour force.

⁹ <http://www.environ.ie/en/Publications/StatisticsandRegularPublications/ConstructionIndustryStatistics/FileDownload.22919.en.pdf>

- Personal consumption declined by 7.0%.
- In the second half of 2009, the US and most EU countries exited recession but Ireland's recovery has lagged that of global economy by at least six months and only exited recession in early 2010. It is forecast that economic recovery in Ireland will remain fairly muted during 2010 and it will be 2011 before annual GDP growth is recorded.

2010 - 2011¹⁰

The Irish economy is expected to contract for the third consecutive year in 2010, before a slow and gradual recovery takes hold in 2011. Recent economic forecasts¹¹ produced by the Irish Economic & Social Research Institute (ESRI) state that:

- In June 2010, total tax revenue was €1.4 billion lower than in the same period in 2009. The equivalent decline between June 2008 and June 2009 was €3.3 billion.
- GDP growth of 0.25% is predicted for 2010. This is driven exclusively by a strong pick up in export growth, together with a very weak resumption of private consumption growth (0.25%).
- Public consumption and investment are expected to continue to contract in 2010.
- GNP is expected to decline by 0.5%.
- A resumption of growth is expected in 2011. This is driven by growth in external demand, but also reflecting a modest resumption of domestic demand.
- The recession has led to a dramatic fall in investment's share of GNP, from over 30 per cent in 2006 to an estimated 14 per cent in 2010. The ESRI expects that this adjustment to have ended in 2011. Total investment is forecast to grow by 2.25%. GDP is expected to grow by 2.75% with GNP by 2.25%.
- An unemployment rate of 13.25% and 13% is forecast for 2010 and for 2011 respectively.
- In 2010, the General Government Deficit is forecast to be 11.5% of GDP. Including the cost of the bailout monies for Anglo Irish Bank and Irish Nationwide Building Society (INBS), this figure would be 19.75%. For 2011, the ESRI expect the deficit to fall to 10.25% of GDP. This is based on the assumption that a full €3 billion package of austerity measures is implemented in the 2011 budget.
- During the first quarter of 2010, exports of goods and services from the Republic of Ireland increased by almost 7% in volume terms, compared to the previous quarter. Over the same period, total Euro area exports grew by just 2.5%. In the short to medium term, the outlook for Irish exports depends on an ongoing recovery in the international economy, particularly in the economies of our main trading partners. The demand for imports from Ireland's key trading partners is shown in Table 1.
- Inflation as measured by the Consumer Price Index (CPI) is set to be minus 0.5% in 2010 and to be 1.75% in 2011.
- Private consumption is forecast to fall by 4% in 2010 and by 3% in 2011.
 - Factors that will negatively affect purchasing power and sentiment are falling employment and rapidly rising joblessness, fears about the banking system, further tax increases and the negative wealth effect of declining house prices and equity values¹².
- The large adjustment for 2010, amounting to 2.5% of GDP, is focused almost exclusively on expenditure cuts, with reductions in welfare payments, public sector salaries and infrastructure spending¹³.
- Economic conditions in 2010 are set to be more favourable than in 2009 for the forestry sector but the trading environment will remain very challenging. The domestic construction sector has yet to reach a turning point and meaningful recovery is a number of years off. The global economy and in particular key export markets such as the UK, has emerged from recession and export opportunities have improved¹⁴.

¹⁰ This is based on the full implementation in 2010 of the savings measures announced for that year in the Supplementary Budget of April 2009. It does not include any provision in respect of the National Asset Management Agency (NAMA).

¹¹ http://www.esri.ie/UserFiles/publications/RB20100201/QEC2010Sum_ES_Summary%20Table.pdf

¹² Economist Intelligence Unit (EIU) country report for Ireland; March 2009

¹³ Economist Intelligence Unit (EIU) country report for Ireland, August 2010

¹⁴ Source: Irish Business and Employers Confederation (IBEC); www.ibec.ie

Table 1: OECD forecast for import growth (%) in key markets (2009 – 2011) ¹⁵

Trading partner	Actual and forecast for import volume growth in key export markets		
	2009	2010	2011
Belgium	-6	2	2
France	-6	3	4
Germany	-3	4	3
UK	-6	4	2
USA	-10	6	4
OECD region	-8	4	3

2.0 Market drivers

2.1 Construction activity

The demand for forest products is closely related to the level of house building, to timber frame use and to demand in key export markets¹⁶. However, in Ireland, the level of residential house completions has declined significantly since 2006¹⁷. In 2009, Ireland's construction output fell more than in 18 other European countries. This analysis was made by Euroconstruct¹⁸, a research organisation that analyses and forecasts construction market trends. Ireland's fall in construction output was almost double that of Spain, the country second most affected by the current downturn in construction activity.

Euroconstruct forecasts that further deep cuts in Irish building output are probable in 2010, with growth unlikely to return to the sector until 2012. This growth is forecast to be a modest 1.6%. While Western Europe is expected to see a gradual pick up in construction activity in 2011, which will gather pace in 2012, it is forecast that Ireland, Spain and Portugal will do no more than stabilise at a deeply depressed level.

The buoyant housing market helped to sustain strong economic growth in recent years as housing investment reached almost 16% of gross national income (GNI), the highest in the OECD. However, the market has turned since 2006¹⁹. In 2009, new residential construction accounted for 3.4% of GNP compared with 7.3% in 2008 and approximately 11.2% in 2007²⁰.

2.1.1 Irish housing output

Figures for the overall level of planning permissions granted in 2009 confirm that it was an extremely bad year in terms of the pipeline of supply. When compared to 2008, the number of residential planning permissions which were granted in quarter 4, 2009 declined by 63.9%²¹. It is estimated that 6,000- 8,000 will be completed in Ireland in 2010 and 2011. This is a 72% reduction on the peak of the housing boom in 2006. Actual and forecast house completions for the period 1990-2011 are shown in Table 2.

The timber frame sector has been a significant user of both construction timber and of wood based panels. Over the period 1992 to 2006, the use of timber frame housing in the Irish construction sector grew from a market share of 5% in 1992 to 30% in 2006^{22,23}. However, since 2006, the output of this sector has

¹⁵ http://www.oecd.org/document/61/0,3343,en_2649_34573_2483901_1_1_1_1,00.html

¹⁶ <http://www.coillte.ie/fileadmin/templates/pdfs/BaconReport.pdf>

¹⁷ <http://www.environ.ie/en/PublicationsDocuments/FileDownload,20136,en.pdf>

¹⁸ www.euroconstruct.org

¹⁹ OECD Economic Surveys: Ireland 2008; <http://www.oecd.org/dataoecd/38/12/40448199.pdf>

²⁰ <http://www.environ.ie/en/Publications/StatisticsandRegularPublications/ConstructionIndustryStatistics/FileDownload,22919,en.pdf>

²¹ <http://www.environ.ie/en/Publications/StatisticsandRegularPublications/HousingStatistics/FileDownload,23310,en.pdf>

²² i.e. market share is taken as the percentage of new house / apartment completions which are constructed using timber frame methods.

²³ Source: Irish timber frame manufacturers association; www.itfma.ie

contracted in line with the overall fall in construction activity. In order to better match supply with demand, many timber frame manufacturers have closed or have taken short time.

Table 2: House completions in the Republic of Ireland (1990–2011f) ^{24,25,26}

Year	House completions	Growth rate 1990 = 100
1990	19,539	100.00
1991	19,652	100.58
1992	22,464	114.97
1993	21,391	109.48
1994	26,863	137.48
1995	30,575	156.48
1996	33,725	172.60
1997	38,842	198.79
1998	42,349	216.74
1999	46,512	238.05
2000	49,812	254.94
2001	52,602	269.22
2002	57,695	295.28
2006	68,819	352.21
2004	76,954	393.85
2005	80,957	414.34
2006	93,419	478.12
2007	78,027	399.34
2008	51,724	264.72
2009	26,420	135.22
2010f ²⁷	7,000	35.85
2011f	7,000	35.85

2.1.2 Repair, Maintenance and Improvement (RMI)

In 2009, the value of the Irish Repair, Maintenance and Improvement (RMI) sector was €7.55 billion (Table 3). This was a reduction of 20.6% over 2008²⁸.

²⁴ House completion data is based on the number of new dwellings connected by the Electricity Supply Board (ESB) to its electricity supply network.

²⁵ Department of the Environment, Heritage and Local Government; www.environ.ie

²⁶ <http://www.cso.ie/px/Doehlg/Dialog/Saveshow.asp>

²⁷ <http://www.environ.ie/en/Publications/StatisticsandRegularPublications/ConstructionIndustryStatistics/FileDownLoad,22919,en.pdf>

²⁸ <http://www.dkm.ie/uploads/pdf/reports/Issue%2020%20FINAL%20indicators%20April%202010.pdf>

Table 3: RMI output in the Republic of Ireland at constant 2007 prices (2005 – 2009) ²⁹

Sector/year	2005	2006	2007	2008	2009
	€ billion				
Residential RMI	€4.00	€4.54	€4.95	€5.53	€4.39
Non residential RMI	€2.62	€2.90	€2.97	€3.09	€2.45
Total RMI spend	€6.62	€7.44	€7.92	€8.62	€6.84

2.2 UK construction market

The UK construction market is a key export market for forest products manufactured in Ireland. This market is showing some signs of improvement. Statistics released in March 2010 by the UK's National House Building Council (NHBC)³⁰ show that applications to build new homes in the UK during the three months to February 2010 were up by 66% over the same period a year ago³¹.

In the second quarter of 2009, demand in the UK softwood lumber market picked up from a low level³². From mid 2009, there were signs that the Irish sawmilling sector was winning market share in the UK³³. This is largely due to a lack of availability of Scandinavian timber in the UK and due to the flexibility of Irish sawmillers to respond to market demand.

2.2.1 The UK market for forest products

The UK is a significant importer of sawn timber and panel products. In 2009, 7.7 million m³ of sawn timber and panel products were imported into the UK. However, in volume terms, the UK sawn market has declined by 38% over the period 2005 – 2009. Panel imports into the UK declined by 37% over the same period (Table 4)³⁴.

It is important to note that in value terms, Ireland's market share of the UK sawn softwood timber market grew from 4.23% in 2007 to 6.16% in 2009³⁵. This is an impressive increase of 46% over a three year period. Moreover, in 2009, the Republic of Ireland was the fourth largest exporter of sawn softwood timber to the UK marketplace. There are further opportunities for the Irish sawmilling sector to grow its market share in the UK.

In 2009, the Irish panel products sector was the second largest exporter of particleboard and OSB to the UK marketplace^{36,37}. Over the period 2007 to 2009, Ireland was the largest exporter of MDF to the UK marketplace. In addition, Ireland's share of the UK MDF market grew from 33% in 2007 to 39% in 2009.

²⁹ <http://www.environ.ie/en/PublicationsDocuments/FileDownload.21120.en.pdf>

³⁰ NHBC, (the National House-Building Council), is the standard setting body and leading warranty and insurance provider for new and newly converted homes in the UK; www.nhbc.co.uk

³¹ <http://www.nhbc.co.uk/NewsandComment/UKnewhouse-buildingstatistics/Year2010/Name.40404.en.html>

³² http://www.euwid-wood-products.com/news_single.html?&tx_ttnews%5Btt_news%5D=627&tx_ttnews%5BbackPid%5D=13&cHash=540afd259c

³³ Source: Drima market research interviews.

³⁴ IFFPA sectoral statistics update; Issue 3 – August 2010

³⁵ This analysis is based on the use of EUROSTAT trade data for the UK;

<http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/themes>

³⁶ Source: Eurostat ; epp.eurostat.ec.europa.eu

³⁷ The EUROSTAT database does not enable the data for particleboard and OSB exports to be separated.

Table 4: UK imports of sawn timber & panel products by volume and year (2005 – 2009) ³⁸

Year	Sawn timber imports	UK panel imports	Total imports
	000 m ³ /annum		
2005	8,341	3,939	12,280
2006	7,963	3,959	11,922
2007	8,469	3,859	12,328
2008	5,886	3,390	9,276
2009	5,172	2,500	7,672

2.3 €/\$ Exchange rate

Since the beginning of 2010, the euro has fallen in value by almost 10%. A substantial part of this decline occurred in May, largely due to the sharp rise in the risk premium associated with Euro area sovereign debt. The single currency fell to an eighteen month low of £0.82 against the pound in early June. Although the rapid decline in the value of the euro appears to have come to a halt, a further weakening of the single currency is possible. In spite of the introduction of the €750 billion support package from the European Union and from the International Monetary Federation (IMF), markets remain concerned about sovereign risk and the possibility of a debt default in one of the Euro area's weakened economies. The Irish economy should benefit from the currency's decline in recent months, as it may provide a further boost to exports outside the Euro area. It could also be argued that the euro has fallen from an overvalued position against many currencies. In the period 2001-2008, the average value of the euro against the pound averaged £0.68³⁹. Historic movements in the €/£ exchange rate are shown in Table 5. Recent forecasts by Barclays Bank anticipate no major change in rates up to May 2011.

Table 5: Historic & forecasted €/£ exchange rates ^{40,41}

Period	€/£	£/€
Q1 2009	0.908	1.101
Q2 2009	0.879	1.138
Q3 2009	0.872	1.147
Q4 2009	0.904	1.106
Q1 2010	0.887	1.127
Q2 2010	0.853	1.172
Q3 2010 ⁴²	0.832	1.202
Forecast ⁴³		
November 2010	0.833	1.200
May 2011	0.833	1.200

³⁸ [http://www.forestry.gov.uk/pdf/trprod10.pdf/\\$FILE/trprod10.pdf](http://www.forestry.gov.uk/pdf/trprod10.pdf/$FILE/trprod10.pdf)

³⁹ http://www.esri.ie/irish_economy/quarterly_economic_commen/latest_quarterly_economic/

⁴⁰ <http://www.bankofengland.co.uk>

⁴¹ <http://www.ecb.int/stats/exchange/eurofxref/html/eurofxref-graph-gbp.en.html>

⁴² Data on €/£ exchange rates for Q3 2010 is based on data available to 6/9/2010.

⁴³ http://www.business.barclays.co.uk/BBB/A/Content/Files/Interest_and_Exchange_Rate_Outlook.pdf

2.4 Demographics

The Irish Economic and Social Research Institute (ESRI) forecasts that net outward migration from the Republic of Ireland will total 70,000 in 2010 and 50,000 in 2011⁴⁴.

3.0 Policy measures

The following policy measures influence the Irish forestry & forest products sector.

3.1 The National Development Plan (NDP); 2007-2013

Over the period 2007 – 2013, the Irish National Development Plan (NDP) will invest €184 billion in the Irish economy. The areas in which the NDP will influence the Irish forestry and forest product sector include.

- Support for afforestation and for the integration of forestry with agriculture.
- The cultivation of fast-growing species, for the purposes of biomass production.
- Skills training for farm foresters.
- The mitigation of climate change.
- Funding for the continuation of the COFORD forest research programme.
- Investment in sustainable energy with a view to meeting the target of 15% of electricity production from renewable sources by 2010.
 - A target has been set to achieve 30% co-firing with biomass in the three peat fired power stations by 2015.
 - A target has been set for biomass to supply 12% of the renewable heat market by 2020.
 - For further information see.
 - Energy White Paper: Section 3.4.2 and the
 - National Renewable Energy Action Plan (NREAP): Section 3.4.4.
- The development of indigenous rural forestry enterprises.
- Support for downstream investment in the forestry sector.
- An investment of €54.7 billion in infrastructure projects.
 - €13.3 billion investment in national roads.
 - €4.3 billion investment in non-national roads.
 - €12.9 billion investment in public transport.
 - An investment of €21.2 billion in social, affordable and voluntary housing schemes.

These projects will support the expansion of the forest estate, provide significant markets for forest products and will help to develop the Irish bioenergy sector.

3.1.1 Research, Technological Development & Innovation (RTDI)^{45,46}

In 2009, RTDI/Research spending within the Irish forest products sector averaged 2%. The changes in RTDI policies that will affect the Irish forest and forest products sector include.

- The newly established Irish Energy Research Council will advise on priorities for Irish energy research to 2013 and for the longer term. The Council will coordinate existing energy Research Technological Development and Innovation (RTDI) activities and provide analysis and advice⁴⁷.

⁴⁴ http://www.esri.ie/irish_economy/quarterly_economic_commen/latest_quarterly_economic/

⁴⁵ Enterprise – Ireland; www.enterprise-ireland.com

⁴⁶ Ireland National Development Plan (NDP; 2007-2013; Government Publications, Dublin, Ireland; www.ndp.ie/viewdoc.asp?fn=/documents/NDP2007-2013/NDP-2007-2013-English.pdf

⁴⁷ <http://www.dcenr.gov.ie/Energy/Office+of+the+Chief+Technical+Advisor/Irish+Energy+Research+Council.htm>

- Environment Research Sub-Programme
 - Some €93 million will be invested in environmental research over the period 2007 to 2013.

3.1.2 Forest research

Following the amalgamation of COFORD⁴⁸ (The National Council for Forest Research & Development) into the Department of Agriculture, Fisheries and Food (DAFF)⁴⁹, the Irish forest research programme is managed by the research division of DAFF. The COFORD Council continues its work in advising the Department regarding the scope of forest research and provides advice to DAFF on issues including roundwood demand and supply. Key areas of forest research include;

- Forest energy (2010-13),
- Facilitating the supply of woodchip from forest plantations for a major heat user,
- Eco-toxicological and growth promoting properties of wood ash,
- Combined research on riparian woodland,
- Broadleaf silvicultural programme and
- The development of low impact silvicultural systems in Ireland.

In 2010, the Irish Minister of State for Agriculture, Fisheries and Food, Seán Connick TD⁵⁰, announced grant assistance of €3 million for the COFORD research programme^{51,52}.

3.2 Support for afforestation

Support measures for afforestation in Ireland include;

3.2.1 Afforestation grants and premiums

Afforestation grant and premium schemes provide a package to encourage the planting of forests by compensating forest owners for the costs of forest establishment and for the income foregone during the maturation of the timber crop. This scheme provides planting and establishment grants as well as annual premiums for new afforestation projects that are compliant with national and EU legislation, operational and environmental guidelines. The scheme is open to farmers and non-farmers. Forests established under this scheme must meet full silvicultural standards and must be managed as a commercial crop for the realisation of a profit^{53,54,55}.

3.2.2 Forest Environment Protection Scheme (FEPS)⁵⁶

This grant scheme was introduced on a pilot basis in 2007 and was formally introduced in 2008;

- It encourages farmers to combine the establishment of high nature-value woodland with their participation in the Rural Environment Protection Scheme (REPS)⁵⁷.

⁴⁸ www.coford.ie

⁴⁹ <http://www.agriculture.gov.ie/>

⁵⁰ A Teachta Dála often shortened to TD in English is a member of Dáil Éireann, the lower house of the Oireachtas (the Irish Parliament); www.oireachtas.ie

⁵¹ <http://www.coford.ie/iopen24/pub/pub/annualreport2007english.pdf>

⁵² <http://www.coford.ie/iopen24/pub/newsletter/v10n6-june2010.doc>

⁵³ http://www.teagasc.ie/forestry/financial_info/afforestation_grant_rates.asp

⁵⁴ http://www.teagasc.ie/forestry/docs/financial_info/AfforestationScheme2007_T&C.pdf

⁵⁵ http://www.teagasc.ie/forestry/docs/financial_info/forestrygrantrates_2009.pdf

⁵⁶ www.agriculture.gov.ie/forestry/files/FEPS_scheme/06-fep%20scheme.pdf

⁵⁷ http://www.client.teagasc.ie/forestry/financial_info/fin_suppt/feqs_questions.asp

- For the first five years, the premium payable under this scheme exceeds that paid under the Afforestation Scheme.
- Farmers planting under FEPS have to adhere to enhanced environmental objectives, some of which are mandatory.
- The new scheme operated on a pilot basis during 2007 and is administered under State Aid Approval Number 161/2007.

3.2.3 Native woodland scheme

The Native Woodland Scheme is an innovative package aimed at protecting and expanding Ireland's native woodland resource and associated biodiversity. The Native Woodland Scheme is a key biodiversity measure within Ireland's national forest policy. It also supports a wide range of other benefits and functions arising from native woodlands, relating to landscape, cultural heritage, wood and non-wood products and services, the practice of traditional woodland management techniques, environmental education, and carbon sequestration. There are two elements under the scheme, each with its own grants levels and premiums.

3.2.4 Forest roads scheme

The forest roads scheme provides opportunities to forest owners to improve access to forests. This is a once off payment of 80% of eligible costs to a maximum of €45/linear metre payable on satisfactory completion of the project⁵⁸.

3.3 Premium payments

In 2009, the Department of Agriculture, Fisheries & Food (DAFF) announced that, following April's Supplementary Budget that the annual forestry premium rates would be cut by 8%. This move has been resisted by groups including the Irish Timber Growers Association (ITGA)⁵⁹ and the Irish Farmers Association (IFA)⁶⁰. However, the annual premium payments made in May 2009 included the 8% reduction. As of September 2009, DAFF has no plans to reverse this reduction.

3.4 Energy policy and support measures

The policy framework and support measures for wood energy are detailed below.

3.4.1 Biomass and the National Development Plan (NDP); 2007-2013

Over the next six years, the Irish National Development Plan⁶¹ will invest €184 billion in the Irish economy. The areas in which the NDP will influence the Irish biomass sector include:

- Provision of support for the cultivation of fast-growing species, for the purpose of biomass production.
- The mitigation of climate change.

⁵⁸ http://www.teagasc.ie/forestry/docs/financial_info/roadscheme_2008.pdf

⁵⁹ www.itga.ie

⁶⁰ <http://archives.tcm.ie/irishexaminer/2009/04/22/story89849.asp>

⁶¹ http://www.ndp.ie/documents/ndp2007-2013/NDP_Summary.pdf

- Investment in sustainable energy with a view to meeting the target of 15% of electricity produced from renewable sources by 2010. A target of 40% of all electricity to come from renewable by 2020 has now been established – see 3.4.4.
 - A target has been set to achieve 30% co-firing with biomass in the three peat-fired power stations by 2015.
- A target has been set for biomass to supply 12% of the renewable heat market by 2020.

3.4.2 Energy White Paper⁶²

Government policy on energy for the period 2007 – 2020 is outlined in a White Paper which was published in 2007. Its primary objectives are security of supply, environmental sustainability and economic competitiveness. From a forestry perspective, the sustainable energy sub-programme outlines how the renewable energy sector is to be developed.

3.4.3 Sustainable energy sub-programme

At least €276 million will be invested in the Irish sustainable energy sector over the period of the NDP. This is in support of the targets for sustainable energy including the promotion of renewable energy, energy efficiency and innovation. Key objectives of this programme include.

- A commitment to delivering significant growth in the use of renewable energy in power generation.
- A target of 33%, which has since been increased to 40%, of electricity consumption from renewable sources by 2020.
 - The Irish Electricity Supply Board (ESB)⁶³ and Bord na Móna⁶⁴, its supplier of milled peat will work with the biomass sector to develop the potential of co-firing at the three State owned peat burning stations.
 - A target has been set to achieve 30% co-firing with biomass in the three peat fired power stations by 2015.
 - Biomass power generation projects will be supported through the Renewable Energy Feed-in Tariff (REFIT) scheme.
 - Under this scheme, the tariff price for non-landfill gas biomass electricity is set at 7.2 c per kWh compared to 5.7 c per kWh for wind.
 - For biomass CHP, the REFIT tariff has been set at 12 c per kWh, and has recently been amended further – see section on REFIT overleaf.
- The use of biomass in power generation will be supported by means of technology transfer, by investment in specific research & development programmes and by tackling supply issues.
- The need to develop Combined Heat and Power (CHP) and district heating schemes has been identified as an area where energy efficiency could be improved.
 - The White Paper targets for CHP output are shown in Table 6. No specific target has been set for biomass CHP⁶⁵. However the REFIT announcement of May 2010 has identified a goal of 100 MW_e of biomass CHP and 50 MW_e of anaerobic digestion (AD) CHP to be achieved with the new support levels (see section 3.4.5).

⁶² www.dcmnr.gov.ie/Energy/Energy+Planning+Division/Energy+White+Paper.htm

⁶³ www.esb.ie

⁶⁴ Bord na Móna supply milled peat to three thermal power plants, owned by both the Electricity Supply Board and by itself, for the generation of electricity. www.bnm.ie

⁶⁵ Source: Sustainable Energy Ireland (SEI); http://www.sei.ie/Publications/Statistics_Publications/EPSSU_Publications/CHP_in_Ireland_2007_Fnl_rpt.pdf

Table 6: Combined Heat and Power (CHP) output targets to 2020⁶⁶

Item/Year	Unit	2010	2020
Target for CHP generated electricity	MW	400	800
Target for CHP generated heat	%	5	12

3.4.4 National Renewable Energy Action Plan (NREAP)⁶⁷

The National Renewable Energy Action Plan (NREAP) was published in July 2010. It sets out the Government’s strategic approach and concrete measures to deliver on Ireland’s 16% target under Directive 2009/28/EC. Climate change, energy security and competitiveness are inter-related challenges that will be addressed through the transforming of Ireland’s economy from one based on fossil fuel dependence to a low carbon economy based around energy efficiency, renewable energy and smart networks.

The Government’s ambitions for renewable energy and the related national targets are fully commensurate with the European Union’s energy policy objectives and the targets addressed to Ireland under the Renewable Energy Directive. Ireland’s energy efficiency ambitions (20% by 2020) as set out in the National Energy Efficiency Action Plan are duly reflected in the NREAP.

The areas of NREAP which affect the wood biomass sector are renewable heat (RES – H) and renewable electricity (RES – E). These are outlined below.

Renewable heat (RES – H)

The Government has set a target of 12% renewable heat by 2020. The related programmes and supports are designed to support the achievement of this target. For historical, geographical and demographic reasons, renewable heat poses considerable challenges for Ireland, which the Government is determined to address.

Renewable electricity (RES – E)

The Government has set a target of 40% electricity consumption from renewable sources by 2020. In the last 5 years in particular, Ireland has made huge strides in accelerating renewable generation (RES – E). In the 2001 European RES-E Directive, Ireland was set a target of moving from 3.6% RES-E to 13.2% RES-E by 2010. Ireland achieved 14.4% RES-E in 2009 and is on track to exceed the national target of 15% in 2010.

The main support scheme for RES-E is REFIT (Renewable Energy Feed-In Tariff)⁶⁸. This scheme currently covers onshore wind (large and small scale), small scale hydro, biomass landfill gas and other biomass. Subject to state aid clearance, REFIT will also be offered for Anaerobic Digestion/High Efficiency CHP, ocean (wave and tidal) energy and offshore wind (see 3.3.5).

3.4.5 Promoting wood energy⁶⁹

In 2006, the Irish Government introduced a five year capital programme to underpin the growth of the Irish renewable heat sector. The grant schemes for this programme have been developed in conjunction with the Sustainable Energy Authority of Ireland (SEAI). The total funding package for this programme is €89 million. The grant schemes contained within this programme are detailed overleaf.

⁶⁶ The targets for “biomass generated electricity” in this table are actually the targets for CHP with an “emphasis on biomass CHP”, i.e. they include fossil fired CHP. No specific target has been set for biomass CHP.

⁶⁷ <http://www.dcenr.gov.ie/NR/rdonlyres/0E9749D9-BB72-49D6-B5BC-DC4EE41A6302/0/DraftNREAPv17June2010forwebsite.pdf>

⁶⁸ <http://www.dcenr.gov.ie/Energy/Sustainable+and+Renewable+Energy+Division/Electricity+from+Renewables+inc+REFIT+and+AE+R.htm>

⁶⁹ Section 3.3 provides details on Ireland’s energy policy and on the promotion of bioenergy / renewable energy.

It is estimated that 272 ktoe⁷⁰ of renewable heat energy will be required in 2010 to meet the renewable energy for thermal applications target⁷¹. Under the EU renewable energy directive⁷², Ireland's target for 2020 is for renewable energy sources to provide 16% of final energy consumption⁷³.

Combined Heat & Power (CHP) grant scheme⁷⁴

This programme provides grants for the installation of CHP units. It aims to develop small-scale CHP units (up to 1 MW) fired by fossil fuels that can be deployed in buildings with a substantial heat requirement. This element of the programme has recently been closed. A second strand covers grant-aid for biomass-fired CHP. The new SEI Biomass CHP/AD⁷⁵ scheme has an indicative budget of €5-8 million. This provides grant support to assist the deployment of biomass CHP and anaerobic digestion CHP systems.

The programme aims to deliver 10-15 MWe biomass CHP, and 10-20 MWe of electricity from small-scale fossil fuel CHP. There is no limit on the size of installations that can be grant-aided if they are fuelled by biomass. To date, one biomass CHP project has been commissioned under this scheme⁷⁶. A number of others are in the early stages of development.

Biomass for households and medium-sized businesses

In recent years, wood biomass systems have been promoted and developed for use in households and in medium-sized industrial premises. This is being promoted by State Agencies including COFORD⁷⁷, the Forest Service⁷⁸, Teagasc⁷⁹ and the Sustainable Energy Authority of Ireland (SEAI)⁸⁰.

Greener Homes Scheme (GHS)⁸¹

This grant scheme was established in 2006. It allows householders to obtain grants for the installation of renewable heat technologies including wood pellet stoves, boilers, solar panels and geothermal heat pumps. Up to June 2010, 28,686 applications had been approved under the GHS, the uptake of which is shown in Table 7.

Table 7: Uptake of the GHS 2009 – 2010⁸²

GHS scheme type	% of total schemes	
	4/2009	6/2010 ⁸³
Solar	54%	59%
Heat pump	23%	20%
Biomass	23%	20%
Wood gasification		0.4%

⁷⁰ ktoe = 1,000 tonnes of oil equivalent.

⁷¹ Source: Sustainable Energy Authority of Ireland (SEAI) www.seai.ie

⁷² *Official Journal of the European Union, L140/16 to L140/62, 5.6.2009.*

⁷³ Source: Sustainable Energy Ireland (SEI) www.sei.ie

⁷⁴ www.sei.ie/chpgrants/

⁷⁵ AD: Anaerobic digestion.

⁷⁶ This is operated by Munster Joinery Ltd.; <http://www.munsterjoinery.ie/index.html>

⁷⁷ <http://www.woodenergy.ie/iopen24/>

⁷⁸ <http://agriculture.gov.ie/forestry/woodbiomassscheme/biomassscheme.pdf>

⁷⁹ http://www.teagasc.ie/forestry/wood_energy/

⁸⁰ www.seai.ie

⁸¹ www.sei.ie/greenerhomes/

⁸² Source: SEI; www.sei.ie

⁸³ Due to rounding differences, these numbers do not total 100%

The scheme has surpassed its original targets. Over 28,000 householders have now availed of grant aid to convert or install renewable heating systems in their homes, with a consequent saving of 265 GWH⁸⁴ and an annual green house gas (GHG) saving of 64,000 tonnes of CO₂ per annum⁸⁵.

ReHeat Programme⁸⁶

This grant support scheme enables community groups, commercial sector, public sector and industrial sector organisations to obtain grants for the installation of wood chip and wood pellet boilers. Grant aid is up to 30% of overall cost. By June 2010, 163 biomass projects had been completed under this scheme with a total output of 67.6 megawatts. The average biomass boiler installed under this scheme had a heat output of 415 kW⁸⁷.

Renewable Energy Feed-In Tariff (REFIT)⁸⁸

The REFIT scheme was launched in May 2006. It provides support to renewable energy projects over a fifteen year period. The new support mechanism differ from the previous programme in that it operates as a fixed feed in tariff mechanism rather than as a competitive tendering process. Applicants in REFIT must have planning permission and a grid connection offer for their projects and they will then be able to contract with any licensed electricity supplier up to the notified fixed prices. This scheme is administered by the Department of Communications, Energy and Natural Resources (DCENR)⁸⁹. The fixed price tariffs are:

- Large wind energy (over 5 Megawatts): 5.7 cent per Kilowatt hour (kWh)⁹⁰
- Small wind energy (under 5 Megawatts): 5.9 cent per Kilowatt hour
- Biomass (landfill gas): 7.0 cent per Kilowatt hour
- Hydro and other biomass technologies: 7.2 cent per Kilowatt hour

The new SEAI Biomass CHP/AD CHP call for proposals has an indicative budget of €5-8 million (out of a total budget of €11 million), will provide grant support to assist the deployment of CHP systems fuelled by biomass⁹¹.

In May 2010 a revised set of tariffs for the biomass combustion, Anaerobic Digestion (AD) and biomass Combined Heat and Power (CHP) were announced⁹² (Table 8).

⁸⁴ GWH: Giga watt hours

⁸⁵ http://www.dcenr.gov.ie/NR/rdonlyres/FC3D76AF-7FF1-483F-81CD-52DCB0C73097/0/NEEAP_full_launch_report.pdf

⁸⁶ www.sei.ie/reheat/

⁸⁷ http://www.seai.ie/Grants/Renewable_Heat_Deployment_Programme/Organisations_supported.pdf

⁸⁸ ec.europa.eu/energy/energy_policy/doc/.../renewables_ie_en.pdf

⁸⁹ www.dcenr.gov.ie

⁹⁰ kWh: Kilowatt hour.

⁹¹ http://www.seai.ie/Grants/Biomass_CHP_Anaerobic_Digestion_CHP_Call_for_Proposals/

⁹²

<http://www.dcenr.gov.ie/Energy/Sustainable+and+Renewable+Energy+Division/Electricity+from+Renewables+inc+REFIT+and+AE+R.htm>

Table 8: REFIT tariffs under the new SEAI CHP/AD CHP

Scheme type	REFIT Tariff €/MWh ⁹³
AD CHP ≤500 kW	€150
AD CHP >500 kW	€130
AD (non CHP) ≤500kW	€110
AD (non CHP) >500kW	€100
Biomass CHP ≤1500kW	€140
Biomass CHP >1,500kW	€120
Biomass combustion, using energy crops	€95
Biomass combustion using all other biomass	€85

3.4.6 Energy Performance of Buildings Directive (EPBD)⁹⁴

Since January 2007, in line with the European Commission's Energy Performance of Buildings Directive (Directive 2002/91/EC)⁹⁵, the energy efficiency of all new houses and apartments in the Republic of Ireland is assessed and certified by a registered building energy rating (BER) assessor. From 2009, this scheme has been extended for existing dwellings, when they are offered for sale or lease. The BER provides information on the dwelling's energy performance and can be used to demonstrate improvements in energy efficiency over time⁹⁶.

3.4.7 Meeting biomass targets

Renewable heat (RES – H)

In the early 1990's there was a decline in the contribution from renewable energy to thermal energy from 2.6% in 1990 to 2.1% in 1995. Between 2000 and 2007 RES-H grew from 2.4% to 3.7% before falling back slightly in 2008 to 3.6%. The provisional RES-H figure for 2009 is 3.9%. This growth in renewable energy (dominated by biomass) that has occurred is mostly due to increased activity in the industrial sub-sectors where the biomass is mostly used (i.e. in the forest products and food sectors). There has also been recent growth in renewable energy use in the residential and services sectors with the introduction of grant support schemes. However, the increases here have to date been small in volume with respect to overall thermal renewable energy consumption. Against this backdrop, the short term target of achieving a 5% renewable energy contribution to Ireland's thermal energy by 2010 is very challenging⁹⁷.

Renewable electricity (RES – E)

In 2009, the share of electricity which was generated from renewable energy sources (RES-E) was 14.3%⁹⁸. This means that Ireland has surpassed the EU interim target of 13.2% RES-E by 2010. The data shown in table 9 suggests that Ireland is firmly on track to meet the Government target of 15% of all electricity generation to be from renewable energy sources by 2010. A significant milestone was achieved in 2009 was that wind energy accounted for over 10% of gross electricity generation (Table 9)⁹⁹.

⁹³ WWh: Mega watt hour

⁹⁴ www.sei.ie/epbd/

⁹⁵ ec.europa.eu/energy/efficiency/buildings/buildings_en.htm

⁹⁶ http://www.dcenr.gov.ie/NR/rdonlyres/FC3D76AF-7FF1-483F-81CD-52DCB0C73097/0/NEEAP_full_launch_report.pdf

⁹⁷ http://www.seai.ie/Publications/Statistics_Publications/SEI_Renewable_Energy_2010_Update/RE_in_Ire_2010update.pdf

⁹⁸ 2009 figures are provisional

⁹⁹ http://www.seai.ie/Publications/Statistics_Publications/SEI_Renewable_Energy_2010_Update/RE_in_Ire_2010update.pdf

Table 9: Renewable energy as a percentage of gross electricity consumption¹⁰⁰

Item/year	1990	1995	2000	2005	2006	2007	2008	2009
	Renewables as a % of gross electricity							
Hydro	4.9	4.1	3.6	2.3	2.5	2.3	3.3	3.2
Wind		0.1	1.0	4.0	5.6	6.7	8.1	10.5
Biomass			0.4	0.5	0.4	0.5	0.5	0.6
Total	4.9	4.2	5.0	6.8	8.5	9.5	11.9	14.3

3.5 National climate change strategy (2007 – 2012)¹⁰¹

Ireland signed the United Nations Framework Convention on Climate Change (UNFCCC¹⁰²) in June 1992 and ratified it in April 1994. As a signatory to the Kyoto Protocol¹⁰³, Ireland is committed to limiting its greenhouse gas (GHG) emissions to 13% above the 1990 level by 2008–2012.

The Irish forestry sector has a key role to play in addressing climate change, through carbon sequestration and through the development of renewable energy resources. Forest areas established as a result of grant-aid under the State/European Union (EU) funded afforestation schemes since 1990 are expected to contribute an annual average emission reduction of 2.074 million tonnes of carbon dioxide (CO₂) over the Kyoto period (2008 – 2012). There is also significant potential for wood fuel to displace fossil fuel, particularly in the generation of heat in industrial, commercial, domestic and institutional markets. In doing so, it can help reduce Ireland's GHG¹⁰⁴ emissions.

Since 2006, the use of wood biomass energy in Ireland has resulted in a total emissions saving of 1.54 million tonnes of carbon dioxide (CO₂).

4.0 Developments in forest products markets

Developments in the Irish forestry and forest products sector are outlined below.

4.1 Irish roundwood harvest

In 2009, 2.421 million m³ of roundwood was processed in the Republic of Ireland. This was a reduction of 19.4% on that harvested in 2007 (Table 10).

¹⁰⁰ Source: SEAI; www.seai.ie and Eirgrid; www.eirgrid.com

¹⁰¹ www.environ.ie/en/PublicationsDocuments/FileDownload.1861.en.pdf

¹⁰² unfccc.int

¹⁰³ unfccc.int/kyoto_protocol/items/2830.php

¹⁰⁴ GHG: Green House Gas.

Table 10: Roundwood available for processing in the Republic of Ireland (2007 - 2009) ¹⁰⁵

Item /year	Irish roundwood harvest 000 m ³ overbark		
	2007	2008	2009
Log imports less exports	57	106	-63
Coillte harvest	2,556	2,279	2,354
Private forest harvest	390	118	130
Total	3,003	2,503	2,421
Harvest as a % of 2007 harvest		83.3%	80.6%
Harvest assortment			
Sawlog (> 14 cm td ¹⁰⁶)	1,934	1,619	1,602
Stake wood (7 – 14 cm td)	180	80	88
Pulp wood (7 – 14 cm td)	889	804	731

Historically the Irish timber processing sector has processed all of the roundwood which has been harvested from Irish forests. In addition there is a lot of scope for the private forest sector to supply wood for energy use¹⁰⁷. Work is currently being finalised on both the COFORD wood supply and wood demand forecasts. Preliminary figures suggest that wood supply from our forests is set to increase from 3.8 million m³ at present to 6.3 million m³ by 2020. The projected level of demand for roundwood on the island of Ireland in 2020 from both the conventional timber processing sectors¹⁰⁸ and from the emerging wood biomass energy sector is shown in Table 11.

Table 11: The projected demand for roundwood on the island of Ireland in 2020^{109,110}

Demand type	Projected demand (2020) million m ³ /annum
Conventional demand ¹¹¹	3.6
Wood biomass energy demand	2.7
Total demand	6.3

4.2 Private forest estate

In the period (1981-2009), over 239,000 hectares of forest have been established by private growers in Ireland¹¹². 211,712 hectares of this estate has been planted since 1990. 84% of private forest owners are farmers¹¹³.

¹⁰⁵ OB: Overbark.

¹⁰⁶ Td: top diameter

¹⁰⁷ <http://www.coford.ie/iopen24/pub/reilly.pdf.pdf>

¹⁰⁸ Conventional roundwood demand is defined as the demand for roundwood for processing by the sawmills and by the wood based panel mills operating in the Republic of Ireland. The use of roundwood for processes drying and / or for wood biomass energy by the Irish forest products sector is contained within the figures for wood biomass energy demand.

¹⁰⁹ <http://www.coford.ie/iopen24/pub/lynn.pdf.pdf>

¹¹⁰ Source: COFORD Demand Group; www.coford.ie

¹¹¹ Conventional demand is taken as the demand for roundwood from the sawmilling and from the panel sectors

¹¹² http://www.teagasc.ie/forestry/docs/technical_info/articles/Teagasc_forestry_situation_outlook_2010.pdf

¹¹³

http://www.teagasc.ie/forestry/docs/technical_info/articles/IUFRO%20The%20Farm%20Forest%20Resource%20&%20Rural%20Development%20in%20Ireland%202006.pdf

However, in recent years, a decline in the rate of farm afforestation has occurred. This is despite the presence of forest grants and premium payments and the recent introduction of the Forest Environment Protection Scheme (FEPS)¹¹⁴. As well as these support payments, the development of emerging markets such as wood energy offers the potential for significant growth in the long-term demand for timber. Nevertheless the afforestation rate continues to decline annually, reflecting hesitancy amongst many Irish farmers to consider investing in forestry¹¹⁵. However the recent decline in returns from alternative agricultural activities may boost planting rates over the next few years.

In addition, the full potential of this farm forest resource for rural development in Ireland has not yet been fully realised. A recent forecast which was undertaken by COFORD shows that the overall net roundwood production from privately owned forests will increase from an estimated 0.38 million m³ in 2009 to 2.95 million m³ by 2028¹¹⁶.

4.3 Private forest forecast¹¹⁷

In 2008, COFORD¹¹⁸ funded an updated forecast of the roundwood volumes available from the Irish private forest estate. This project was undertaken by a team at University College Dublin (UCD). An overview of this forecast is outlined overleaf (Table 12).

- In 2008, according to the Irish National Forest Inventory (NFI)¹¹⁹, the area of privately-owned forest was 320,000 ha.
- Total growing stock is estimated as 18.5 million m³ of roundwood.
- Most of this private forest estate has been established over the past two decades, with many areas now entering the first thinning stage.
- The COFORD forecast study has shown that the annual potential level of roundwood supply from privately-owned forests is predicted to increase eight fold over present levels, to reach almost 3 million m³ by 2028.
- This shows that the overall net roundwood production from privately owned forests will increase from an estimated 0.38 million m³ in 2009 to 2.95 million m³ by 2028.
- An assessment is also made of the volume assortment that could potentially be used for wood energy. This is detailed in Table 12.

Table 12: Forecast harvest from the Irish private forest estate (2009 to 2028)

Year	Net volume in 000 m ³ OB				Potential energy volume ¹²⁰ 000 m ³
	7-13 cm	14- 19 cm	> 20 cm	Total	
2009	257	11	15	381	302
2014	330	209	56	595	388
2019	515	362	209	1,086	607
2024	576	627	539	1,793	675
2028	530	951	1,472	2,953	626

- Realising this increase in potential production will entail significant capital investment in roads, harvesting equipment and IT systems by forest owners, contractors and by the State.

¹¹⁴ www.teagasc.ie/environment/schemes/feps.asp

¹¹⁵ http://www.teagasc.ie/forestry/docs/technical_info/articles/teagasc_outlook_forestry_0809.pdf

¹¹⁶ <http://www.coford.ie/iopen24/pub/forecast-fnl.pdf>

¹¹⁷ <http://www.coford.ie/iopen24/pub/forecast-fnl.pdf>

¹¹⁸ www.coford.ie

¹¹⁹

<http://www.agriculture.gov.ie/media/migration/forestry/nationalforestinventory/nationalforestinventorypublications/4330NFIRResults.pdf>

¹²⁰ Energy forecast data is based on the use of biomass expansion factors (BEF).

- The total thinning area, from first, second, third and subsequent thinnings increases over time and peaks at circa 30,000 ha in 2022. This scale of thinning, to be achieved within the next thirteen years, represents a significant challenge to the overall forestry sector.
- Given the disperse nature of the private forest resource and the small average plantation size, innovation in wood procurement, harvesting and transport is essential to drive down costs, reduce measurement overheads, and eliminate double handling.
- Existing sales/procurement systems are too costly and are in need of radical overhaul. Savings due to economies of scale by combined selling of wood from clusters are also possible

4.4 Forecast of roundwood supply and demand

The COFORD supply and demand groups are currently working to produce a new supply and demand forecast for wood fibre use and availability on the island of Ireland to 2020. It is expected that this work will be published in September 2010.

4.5 Sources & uses of wood fibre

The wood fibre sources which provide the Irish forest industry with its raw material (2007 – 2009) are shown in Table 13, while the products produced by the sector for the same period are shown in Table 14.

Table 13: Sources of wood fibre in the Republic of Ireland (2007 - 2009) ¹²¹

Fibre source	Volume 000 m ³ OB		
	2007	2008	2009
Roundwood	3,003	2,503	2,421
Sawmilling residues	966	846	838
Wood based panel (WBP) residues ¹²²	125	106	94
Post consumer recovered wood (PCRW)	264	208	200
Total	4,358	3,663	3,553

¹²¹ Source: EUROSTAT JWEE report for Ireland (2007 -2009) & EUROSTAT JFSQ report for Ireland (2007 – 2009).

¹²² This includes bark (from the debarking lines at Medite & SmartPly) and sawdust which is produced from the sanding of wood based panels.

Table 14: Uses of wood fibre in the Republic of Ireland (2007 -2009)

Uses of wood fibre	Volume 000 m ³ OB		
	2007	2008	2009
Sawmilling sector	1,934	1,619	1,602
WBP sector	1,673	1,462	1,286
Round stakes	180	80	88
Wood biomass use by the forest products sector ¹²³	324	378	431
Other uses			
Horticultural bark mulch	132	44	54
Wood chip for commercial biomass use	20	30	55
Exports of forest product residues	95	50	37
Total	4,358	3,663	3,553

4.5 Wood residues

The wood residues arising within the Irish forest products sector are outlined below. These are primarily used as feedstock for sawmill kilns and for the wood based panel sector (WBP). Post consumer recovered wood (PCRW) is increasingly being used for wood energy and for the manufacture of particleboard. Since 2007, the production of wood residues has declined by 23% (Table 15).

Table 15: Wood residue output for the Republic of Ireland (2007 - 2009)¹²⁴

Wood residue type	Volume ¹²⁵ in 000 m ³		
	2007	2008	2009
Bark	271	203	215
Wood chip	687	470	517
Sawdust	229	152	200
Post consumer recovered wood (PCRW)	279	208	200
Total residue output	1,466	1,033	1,132
Residue output relative to 2007		70%	77%

4.6 Certification

4.6.1 Certified forests

Since May 2001, Coillte's forests have been certified to the Forest Stewardship Council (FSC) scheme. In 2007, Coillte had its Forest Stewardship Council (FSC) certificate for responsible forest management

¹²³ Wood biomass is used by the forest products sector for process drying, heating and for the generation of electricity.

¹²⁴ Source: EUROSTAT Joint Wood Energy Enquiry (JWEE)] for Ireland; 2007, 2008 & 2009.

¹²⁵ Roundwood equivalent.

renewed until 2012 by Soil Association Woodmark, an independent firm of environmental auditors¹²⁶. A small number of privately-owned forests have also been certified by FSC.

The draft PEFC¹²⁷ Irish Forest Certification Standard¹²⁸ was made available for public consultation from 25th March to 11th June 2010, following which independent analysis of all the submissions was undertaken. During this time, pilot testing of the draft standard was also carried out by Control Union Certifications, in three separate woodlands, one privately owned and two owned by Coillte. The independent analysis and Control Union report is in the process of being considered by the Standard Setting Forum and it is anticipated that the Forum will finalise the standard by the end of October, following which the PEFC Ireland Scheme for Sustainable Forest Management will be submitted to the PEFC Council for endorsement. The timescale for the endorsement process is typically 6-8 months. Provided the application is successful, it is hoped that the standard will be available for implementation in Irish woodlands during summer 2011¹²⁹.

4.6.2 Certified forest products

All major sawmills and panel mills have chain-of-custody procedures. The demand for certified timber products in the Irish market is still relatively small and there is no strongly developed public procurement policy for them.

4.7 Value added products – wooden furniture

In 2009, wooden furniture to the value of €177 million was imported into the Republic of Ireland. However, this value has declined by 59% over the period 2007 – 2009. The value of the furniture exported from Ireland declined by 49% over the same period (Table 16).

Table 16: The value of wooden furniture imports & exports in Ireland (2007 - 2009)¹³⁰

Category	Value € million		
	2007	2008	2009
Imports	€434	€317	€177
Exports	€47	€35	€24

4.8 Trade in forest products

In 2009, imports of forest products equalled €464 million, mainly pulp and paper products (over 71%), with sawn timber and wood based panels making up the remainder. A reduction in Irish construction output has led to a significant reduction in sawn timber and panel imports in 2008 and in 2009¹³¹. These imports declined by 74% and 53% respectively over the period 2007 – 2009 (Table 17).

¹²⁶ http://www.coillte.ie/fileadmin/user_upload/pdfs/2007_Annual_Report/CEO_review.pdf

¹²⁷ PEFC: Programme for the Endorsement of Forest Certification; www.pefc.org

¹²⁸ <http://www.pefc.org/news-a-media/general-sfm-news/news-detail/item/487-national-public-consultation-on-draft-irish-forest-management-standard>

¹²⁹ Source: Irish Timber Growers Association; www.itga.ie

¹³⁰ Source: EUROSTAT JFSQ for Ireland (2007, 2008 & 2009).

¹³¹ Sawn timber imports are reported in Ireland's EUROSTAT JFSQ return for 2007, 2008 & 2009.

Table 17: Irish timber trade (2007 - 2009) ^{132,133}

Product	Imports					
	000 m ³			€ million		
	2007	2008	2009	2007	2008	2009
Sawn timber	724	412	232	€251	€141	€66
WBP	358	264	181	€146	€108	€68
	000 tonnes			€ million		
Pulp products	31	29	32	€22	€20	€22
Paper & paperboard products	546	526	379	€467	€520	€308
Total				€886	€789	€464
	Exports					
	000 m ³			€ million		
Sawn timber	381	389	564	€71	€54	€51
WBP	757	614	580	€262	€195	€147
	000 tonnes			€ million		
Pulp products	0	2	0	€0	€0	€0
Paper & paperboard products	85	77	45	€92	€69	€45
Total				€425	€318	€243

4.8.1 Sawn timber

In 2009, a sharp reduction in Irish construction output led to a significant reduction in sawn timber imports. In 2009, the Irish market consumed 442,000 cubic metres (m³) of sawn timber (Table 18). This was a 73% reduction on 2006. In 2009, Irish sawmills supplied 48% of the Irish market for sawn timber. They exported 564,000 cubic metres of sawn timber. This generated export earnings of €51 million (Table 17).

Nine companies form the core of the Irish sawmilling sector, providing the main market for the sawlog and stakewood which is harvested from Irish forests (Table 19).

The majority of the logs which are supplied to Irish sawmills are certified to FSC^{134,135} or to PEFC¹³⁶ standards. In addition, Irish sawmills have their own chain of custody (CoC) certification. This enables them to certify their products to FSC or PEFC standards. The end user (of Irish produced sawn timber products) can therefore be confident that the timber products which they source from Irish sawmillers meet strict environmental criteria. These criteria are independently verified.

In 2009, Irish sawmills utilised 1.699 million m³ of roundwood. 97% of this roundwood was sold by Coillte, with the balance supplied by imports and by the private forest sector. On average, over the three year period (2007 – 2009), 71% of the roundwood which was available for processing¹³⁷ in the Republic of Ireland was utilised by the Irish sawmilling sector (Table 20). The balance is made up of pulpwood which is used to produce panel products^{138,139}.

¹³² This table includes import / export figures for sawn timber, wood based panels (WBP) & pulp / paper products only. Data is taken from Ireland's EUROSTAT JFSQ returns (2007 – 2009). Roundwood, sawmill residues and secondary processed timber products are not included.

¹³³ This data is based on Ireland's EUROSTAT Joint Forest Sector Questionnaire (JFSQ) return for 2007, 2008 & for 2009.

¹³⁴ FSC: Forest Stewardship Council; www.fsc.org

¹³⁵ The Forest Stewardship Council (FSC) is an independent, non Governmental, not for profit organisation established to promote the responsible management of the world's forests; www.fsc.org

¹³⁶ www.pefc.org

¹³⁷ i.e. Roundwood available for harvesting in the Republic of Ireland (ROI) is defined as; ROI roundwood harvest + roundwood imports – roundwood exports

¹³⁸ This harvest excludes firewood.

¹³⁹ These include particleboard, MDF, OSB and moulded door facings.

Table 18: Irish sawn timber market size (2006–2009) ¹⁴⁰

Sector	Volume of sawn timber in 000 m ³			
	2006	2007	2008	2009
Domestic production (softwood)	1,091	984	701	772
Domestic production (hardwood)	3	4	1	2
Exports	-393	-381	-389	-564
Imports	911	724	412	232
Market size	1,612	1,331	725	442
Market size relative to 2006		83%	45%	23%

Table 19: Key sawmills operating on the island of Ireland by size and location ¹⁴¹

Sawmill size	Sawmill name	Location(s)	Website (if applicable)
Large	Balcas Ltd.	Enniskillen, Co. Fermanagh, Northern Ireland	www.balcas.com
Large	ECC Timber Products Ltd./ Earraí Coillte Chonnacht Teoranta	Corr na Móna, Co. Galway	www.ecc.ie
Large	Glennon Brothers Ltd.	Longford, Co. Longford Fermoy, Co. Cork	www.glennonbrothers.ie
Large	Grainger Sawmills Ltd.	Enniskeane, Co. Cork	www.graingersawmills.com
Large	Murray Timber Group (MTG)	Ballygar, Co. Galway Ballon, Co. Carlow	www.mtg.ie
Medium	Coolrain Sawmills Ltd.	Coolrain, Co. Laois	www.gardendeckingfencing.ie
Medium	Laois Sawmills Ltd.	Portlaoise, Co. Laois	None
Medium	Palfab Ltd.	Lissarda, Macroom, Co. Cork	www.palfab.com
Medium	Woodfab Timber Ltd.	Aughrim, Co. Wicklow	www.woodfabtimber.ie

Table 20: Roundwood available for processing in the Republic of Ireland (2007 -2009) ¹⁴²

Item/year	2007	2008	2009
	000 m ³ overbark (OB)		
Log imports less exports	57	106	-63
Coillte harvest	2,556	2,279	2,354
Private forest harvest	390	118	130
Roundwood available for processing	3,003	2,503	2,421
Of which			
Sawlog	1,934	1,619	1,602
Stake wood	180	80	88
Total use of roundwood by sawmills	2,114	1,699	1,690
% use of roundwood by sawmills	74%	68%	70%

¹⁴⁰ Sources: CSO Trade Statistics www.cso.ie & EUROSTAT JFSQ for Ireland (2007, 2008 & 2009).

¹⁴¹ Source: Drima market research survey.

¹⁴² Source: EUROSTAT Joint Forest Sector Questionnaire (JFSQ) report for Ireland (2008 – 2010).

The primary products produced by the Irish sawmill sector include construction/structural timber, pallet / packaging timber and fencing products. In recent years Irish produced structural timber was largely sold on the home market with pallet and fencing products making up the bulk of sawn timber exports. However, in recent years, Irish sawmillers have worked hard to develop new products and markets. Such products include;

- Acoustic barriers¹⁴³,
- Planed all over (PAO)/eased edge timber studding¹⁴⁴ and
- Fencing products¹⁴⁵.

The development of new products for sawn timber has required considerable investment in both sawmill processing facilities and in marketing and sales development in key export markets. In 2009, despite difficult market conditions, the exports of Irish sawn timber (in volume terms) increased by 45% over 2008 (Tables 18 & 21). Irish sawn timber exports have traditionally been dominated by pallet and by fencing products. However, in recent years, the volume of construction timber which has been exported from the Republic of Ireland has increased significantly. This is largely sold in Northern Ireland and in the UK. Over the period 2000 - 2009, the volume of sawn softwood which has been exported by the sawmill sector in the Republic of Ireland has increased by 205% (Table 21)¹⁴⁶.

Table 21: Exports of sawn softwood from the Republic of Ireland (2000 – 2009)

Year	Irish sawn softwood exports
	000 m ³ underbark (UB)/annum
2000	274
2001	336
2002	485
2003	502
2004	495
2005	428
2006	447
2007	374
2008	387
2009	564

Sawn softwood imports

The top ten softwood exporters to Ireland for 2007, 2008 and 2009 are detailed in Table 22.

¹⁴³ <http://www.woodfabstructures.ie/acoustic.html>

¹⁴⁴ http://www.mtg.ie/construction_timber.html

¹⁴⁵ <http://www.glennonbrothers.ie/glenfence.html>

¹⁴⁶ Source; Central Statistics Office (CSO); www.cso.ie

Table 22: Top 10 softwood exporters to Ireland (2007 – 2009) ¹⁴⁷

Exporting country	Volume of sawn softwood exported to Ireland in 000 m ³		
	2007	2008	2009
Sweden	122	90	44
Great Britain	80	35	33
Germany	72	62	22
Finland	70	33	13
Russia	67	37	22
Latvia	63	25	16
Northern Ireland	47	28	21
Brazil	18	2	
Estonia			3
Canada	17	4	2
Austria	7	1	5
Percentage of total softwood imports	92%	91%	95%

Sawn hardwood

- Domestic sawn hardwood production is small producing just 1,451 cubic metres of sawn hardwood timber in 2009.
- In 2009, Ireland imported 41,000 cubic metres of sawn hardwood.
- These had an import value of €27 million.
- However, the volume of hardwood imports declined by 37% over 2008.
- The top ten hardwood exporters for 2007, 2008 & 2009 are detailed in Table 23.

Table 23: Top 10 hardwood exporters to Ireland (2007 – 2009) ¹⁴⁸

Exporting country	Volume of sawn hardwood exported to Ireland in 000 m ³		
	2007	2008	2009
Cameroon	35	12	13
United States	27	16	9
Ivory Coast	11	6	2
Northern Ireland	11	6	6
China	10	4	1
Canada	5	2	1
Sweden	5	5	1
Great Britain	4	4	2
Congo			1
Ghana	3	1	
Germany	3	2	1
Percentage of total hardwood imports	93%	89%	93%

¹⁴⁷ Source: Central Statistics Office (CSO); www.cso.ie

¹⁴⁸ Sources: CSO Trade Statistics www.cso.ie & EUROSTAT JFSQ for Ireland (2007, 2008 & 2009)

4.8.2 Wood Based Panels (WBP) ¹⁴⁹

In 2009, the Irish panel products sector had a combined output of 709,000 m³. This was a 9% decline over 2008 and a 23% reduction over 2007 (Table 24). The sector is an active buyer of pulp wood; sawmill residues (i.e. sawdust, woodchip and bark) and post consumer recovered wood (PCRW). In 2009, the estimated annual wood fibre requirement¹⁵⁰ (for process use) of the panel mills operating in the Irish Republic (Table 25) was 1.29 million m³.

Table 24: Total output of the wood panel sector in the Republic of Ireland (2007 – 2009)¹⁵¹

Item/year	WBP output in 000 m ³		
	2007	2008	2009
WBP production	918	779	709
2009 output expressed as a % of 2007 output		85%	77 %

Table 25: Wood based panel manufacturers in the Republic of Ireland

Company	Established	Product(s)	Location
Finsa Forest Products ¹⁵²	1984	Chipboard/Particleboard	Scariff, Co Clare
Masonite Ireland ¹⁵³	1997	Thin MDF/Moulded door facings	Drumsna, Co Leitrim
Medite-Europe ¹⁵⁴	1983	Medium Density Fibreboard (MDF)	Clonmel, Co Tipperary
SmartPly Europe ¹⁵⁵	1995	Oriented Strand Board (OSB)	Slieverue, Co Kilkenny

In 2009, 82% of the panel products which were manufactured in Ireland were exported. In total, 580,000 m³ of panel products were exported from Ireland to a value of €147 million (Table 26). These exports are dominated by export sales of Oriented Strand Board (OSB) and Medium Density Fibreboard (MDF) products. These products are manufactured by Masonite, Medite and by SmartPly.

Table 26: The value & volume of panel product exports from the Republic of Ireland (2007 - 2009) ¹⁵⁶

Product type	Export volume and value/annum					
	000 m ³			€ million		
	2007	2008	2009	2007	2008	2009
All panel products	757	614	580	262	195	147
Export as a % of 2007		81%	77%		74%	56%

¹⁴⁹ EUROSTAT / FAO Joint Forest Sector Questionnaire (JFSQ) for Ireland; 2007, 2008 & 2009

¹⁵⁰ This includes pulpwood, wood chips, sawdust and post consumer recovered wood (PCRW).

¹⁵¹ Source: Woodflow in the Republic of Ireland (2006 – 2009); COFORD; www.coford.ie

¹⁵² The plant at Scariff was formerly operated by Aicher GmbH/ Chipboard Ltd. It first opened in 1965. This facility is now owned and operated by Finsa; www.finsa.es

¹⁵³ <http://www.masonite.com/>

¹⁵⁴ Medite – Europe Ltd was established in Clonmel by the Medford Corporation in 1983. It was acquired in November 2006 by Coillte; www.medite-europe.com

¹⁵⁵ The OSB mill at Slieverue, Co Kilkenny was first established as a joint venture between Coillte and Louisiana – Pacific in 1995. Coillte acquired full ownership of the business in May 2002; www.smartply.com

¹⁵⁶ Source: Eurostat Joint Forest Sector Questionnaire for Ireland 2009 & 2010.

Key markets for Irish panel product exports are the UK and the Benelux countries. In 2009, the Irish panel products sector was the second largest exporter of particleboard and OSB to the UK marketplace. Over the same period Ireland was the largest exporter of MDF into the UK marketplace¹⁵⁷.

4.8.3 Pulp & paper¹⁵⁸

- All pulp and paper used in the Irish market is imported.
- Pulp & paper imports represent 71% of Irish forest product imports (by value).
- In 2009, 411,000 metric tonnes of pulp and paper products were imported into Ireland. This is a 26% reduction on the volume imported in 2008.
- These imports were worth €330 million. This is a 39% reduction on 2008.
- 471,000 tonnes of recovered paper were exported from Ireland for recycling.

4.8.4 Builders merchandising

The reduction in Irish building output is having a significant knock on effect on the Irish builder's merchant sector and on its suppliers.

- Building materials and DIY group Grafton suffered a dramatic fall in pre-tax profits in the first half of 2009, due mainly to the building slumps which it is encountering in its key Irish and British markets¹⁵⁹. The Grafton annual report for 2009 stated that its Irish builder's merchant business recorded a year on year turnover decline of 42%¹⁶⁰.
- Up to December 2009, the Wolseley Group operated the Brooks Group¹⁶¹, Ireland's largest timber distributor. In the year ended 31 July 2009, Wolseley's Irish businesses had combined sales of €237m and underlying operating losses of €34m. These businesses have since been sold¹⁶².

4.8.5 Wood biomass

Biomass overview^{163,164}

There is growing interest in the Irish bio-energy sector. This is being promoted by the Sustainable Energy Authority of Ireland (SEAI)¹⁶⁵ and DAFF/COFORD¹⁶⁶ schemes as detailed in section 3.4 of this report. The output¹⁶⁷ of the Irish biomass sector is currently dominated by the wood processing sector. In 2009;

- The output of the sector grew by 11%.
- The Irish forest industry used 329,000 tonnes of wood biomass.
- The heat generated by the Irish biomass sector is estimated to be 3,493 Terra Joules (TJ).
- The electricity generated by the Irish biomass sector is estimated to be 240 Terra Joules (TJ). This includes the use of wood biomass for co – firing with milled peat by Edenderry Power¹⁶⁸.

¹⁵⁷ Source: Eurostat

¹⁵⁸ EUROSTAT / FAO JFSQ Return for Ireland for 2008 - 2010.

¹⁵⁹ <http://archives.tcm.ie/irishexaminer/2009/08/29/story99709.asp>

¹⁶⁰ <http://investor.graftonplc.com/grf/investors/presentations/2009/pub2009/ar2009/ar2009.pdf>

¹⁶¹ <http://www.brooksgroup.ie/>

¹⁶² <http://www.brooksgroup.ie/display.php?primarynav=aboutus>

¹⁶³ Harvesting and processing forest biomass for energy production in Ireland; The forest energy 2006 Programme; Pieter D. Kofman and Tom Kent; COFORD; www.coford.ie/iopen24/pub/product_info.php?products_id=966605

¹⁶⁴ UNECE Joint Wood Energy Enquiry (JWEE) for Ireland; 2007 - 2009

¹⁶⁵ www.seai.ie

¹⁶⁶ <http://www.woodenergy.ie/iopen24/>

¹⁶⁷ EUROSTAT / FAO Joint Forest Sector Questionnaire (JFSQ) for Ireland; 2008 -2009

¹⁶⁸ <http://www.edenderrypower.ie/>

Biomass input & energy output

The use of wood biomass in Ireland is dominated by the forest products sector, which uses it for process drying and for energy purposes. Since 2006, the use of wood energy by commercial and domestic users has risen considerably (Table 27). The average annual growth rate of the domestic use of wood biomass between 2005 and 2009 was 18%¹⁶⁹.

Table 27: Feedstock used by the wood biomass energy sector in Ireland (2007 - 2009)¹⁷⁰

Biomass type	End use	Usage 000 m ³		
		2007	2008	2009
Firewood	Domestic heating	44	54	87
Wood chips	Commercial heating	35	63	53
Short rotation coppice (SRC)	Commercial heating	1	1	4
Wood pellets & briquettes	Domestic & commercial heating	67	82	110
Charcoal	Domestic use	2	2	2
Biomass use by the energy ¹⁷¹ & forest products industry ¹⁷²	Process drying/heating /CHP	420	384	438
Total		569	586	694
Percentage forest products use.		74%	66%	63%

The energy output of the wood biomass sector in Ireland is shown in Table 28.

Table 28: Energy output of the Irish wood based biomass sector (2007 – 2009)¹⁷³

Item	Unit	Output		
		2007	2008	2009
Heat output	TJ	4,931	4,857	5,273
Electricity output	TJ	51	112	240
Total output	TJ	4,982	4,969	5,513
Tonnes CO ₂ abated	000 tonnes	381	380	422

Biomass fuelled Combined Heat & Power (CHP)

There are currently two commercial wood fuelled biomass CHP plants in operation in the Republic of Ireland. These are Grainger Sawmills Ltd. and Munster Joinery Ltd¹⁷⁴. The heat and electricity output of these facilities are shown in Table 29.

¹⁶⁹ http://www.seai.ie/Publications/Statistics_Publications/SEI_Renewable_Energy_2010_Update/RE_in_Ire_2010update.pdf

¹⁷⁰ Source: EUROSTAT Joint Wood Energy Enquiry (JWEE) return for Ireland; 2007, 2008 & 2009

¹⁷¹ This includes co-firing of wood biomass at Edenderry Power; www.edenderrypower.ie

¹⁷² In 2008 - 2009, the requirement for wood biomass use by this sector declined in line with the decline in Wood Based Panel (WBP) output.

¹⁷³ Source; UNECE Joint Wood Energy Enquiry (JWEE); 2007 – 2009

¹⁷⁴ <http://www.fingleton.ie/pdf/chp/672-MUNSTER-JOINERY-CHP.pdf>

Table 29: Existing biomass fuelled CHP output in the Republic of Ireland (2009)

Plant name & location	Feedstock	Electricity output MWe	Heat output MWth
Grainger Sawmills, Enniskeane, Co Cork ¹⁷⁵	Sawmill residues	2.0	4.0
Munster Joinery Ltd., Ballydesmond, Co Cork ¹⁷⁶	Joinery residues	3.0	11.0
Total		5.0	15.0

Carbon savings

Since 2006, the use of wood biomass in Ireland has reduced Irish carbon dioxide (CO₂) emissions by 1.54 million tonnes. This saving averages 380,000 tonnes of CO₂ per annum.

5.0 Irish forests & the environment

The Irish forestry and forest products sector has strong environmental and non timber benefits. All major Irish timber processors and growers are certified by the Forest Stewardship Council (FSC)¹⁷⁷ or by the Programme for the Endorsement of Forest Certification (PEFC)¹⁷⁸. A report on forest recreation in Ireland has estimated that 18 million people visit Irish forests per annum. In addition, Ireland's forests create an opportunity to conserve and enhance bio-diversity at both a local and a national level. Over the five year period of the Kyoto Protocol (2008-2012), Irish forests will sequester 11 million tonnes (Mt) of carbon dioxide (CO₂). Over this 5 year period, this represents a total projected saving to the Irish taxpayer of €220 million. By 2020, the amount of CO₂ which will be sequestered annually from Irish forests is estimated to increase to over 4 million tonnes per annum¹⁷⁹.

6.0 New developments

6.1 Coillte biomass energy

Coillte¹⁸⁰, the Irish public forestry company, has recently concluded an agreement with the building contractor Sisk and with CES Energy to deliver flexible renewable energy solutions to Irish industry. Sisk and CES bring the engineering and technological abilities to design and deliver the generating infrastructure to compliment Coillte's management and innovation of the fuel supply chain¹⁸¹.

6.2 Coillte wind energy

In 2010, Coillte has concluded an agreement for the development of one of Ireland's largest wind projects in Co. Galway. The project, which is located on Coillte-owned lands in Cloosh Valley near Moycullen, will see Scottish and Southern Energy take a 45% stake along with State-owned Coillte, while Canadian firm

¹⁷⁵ <http://www.graingersawmills.com/chp.htm>

¹⁷⁶ http://www.sei.ie/Your_Business/Large_Industry_Energy_Network/Workshop_Presentations/John_Fingleton- CHP_Projects.pdf

¹⁷⁷ www.fsc.org

¹⁷⁸ www.perfc.org

¹⁷⁹ <http://www.agriculture.gov.ie/media/migration/2020/2020strategy/2020Forestry.doc>

¹⁸⁰ www.coillte.ie

¹⁸¹ http://www.seai.ie/News_Events/Events/SEAI_Events/Fuelling_the_future_Coillte.pdf

Finavera Renewables will retain the remaining 10%. Once completed, this his project will have a total capacity of 105 MW¹⁸².

6.3 Forest health – sudden oak death

At the end of July 2010, the Irish Forest Service detected from surveys the first findings of sudden oak death (*Phytophthora ramorum*) on Japanese larch trees. These were showing extensive dieback from the crown and down the stem. Subsequently another location was identified where Japanese larch was dying back due to the presence of *Phytophthora ramorum*. In addition there are three confirmed findings of *Phytophthora ramorum* in Japanese larch forests in Northern Ireland. The landowners of the infected sites are required to clearfell the infected areas as a matter of urgency in order to attempt to contain the further spread of the pathogen¹⁸³.

6.4 Forestry review

In October 2009, the Forest Service announced that they were undertaking a review of the Irish forestry and forest products sector. The guidance document for the review states that the Forest Service is committed to "review state forestry policy to take account of its critical role in relation to climate change and its importance to construction, bio-energy, bio-diversity and its potential to deliver long-term employment in other downstream industries e.g. eco-tourism, furniture, crafts etc. The review will include the role of Coillte and its functions and operations. It will also assess the effectiveness of current forestry grant schemes and make recommendations on how best to deliver supports in the future"¹⁸⁴. This work will be undertaken in three stages as follows:

1. An overarching group with wide representation dealing with national forestry policy,
2. An interdepartmental group dealing with the funding of forestry schemes and finally
3. An interdepartmental group with Coillte representation dealing exclusively with the role, functions and operations of Coillte.

6.5 Glennon Brothers secures its first French export order

In late 2009, the Irish timber processing firm Glennon Brothers secured a contract to deliver the first ever shipments of Irish and UK home-grown timber to France in a €1.5 million deal. Five shipments of kiln dried structural timber for use by the French house building sector will be shipped to France from Youghal, Co. Cork and from Troon in Ayrshire, Scotland. This deal represents a first in both a UK and an Irish context^{185,186}.

6.6 Imperative Energy

In late 2009, Imperative Energy announced that it has completed a €30m equity funding package with Rockfield Energy LLP, a UK-based private equity firm specialising in renewable energy investments. The investment will be used to finance the growth plans of Imperative Energy which expects to achieve almost

¹⁸²

http://www.coillte.ie/aboutcoillte/news_room/latest_news/coillte_signs_agreement_with_scottish_and_southern_energy_and_finavera_to_develop_ireland_s_largest_onshore_wind_project/

¹⁸³

<http://www.agriculture.gov.ie/media/migration/forestry/forestservicegeneralinformation/foresthealthandseeds/QAPramorumonJL230810.pdf>

¹⁸⁴ <http://www.agriculture.gov.ie/forestryreview/messagefromministerofstatekilleen/>

¹⁸⁵ <http://www.glennonbrothers.ie/press/france.html>

¹⁸⁶ <http://archives.tcm.ie/businesspost/2010/02/28/story47582.asp>

400 MW of installed capacity from biomass across the UK and Ireland over the next 5 years. IEL expects to be profitable in 2011 and has ambitious targets for growth. These include having 200 MW of biomass capacity installed under a design, build, finance and operate model within the next five years. Around 10% of this capacity will be in Ireland with 90% in the UK¹⁸⁷.

6.7 Irish Timber Growers Association (ITGA) timber sales system

In 2010, the Irish Timber Growers Association (ITGA) launched a private timber sales dispatch system. This is designed to support timber growers and to encourage the thinning of private forest areas. This system has been designed to assist with accountability and security in timber sales from private forests¹⁸⁸.

6.8 Medite MDF now CARB 2 compliant

Following a €15 million investment in new technology and equipment to improve its MDF production facilities, from January 2010 all Medite products are now fully CARB 2 (California Air Resources Board) compliant^{189,190}. This is more than a year before the CARB 2 regulation¹⁹¹ becomes compulsory in the USA¹⁹².

6.9 Safety in forestry operations

In December 2009, a new code of practice for managing health and safety in forestry operations came into effect. This new code of practice provides practical guidance on observing the provisions of health and safety legislation for forestry operations¹⁹³.

6.10 SmartPly Site Protect

SmartPly SiteProtect¹⁹⁴ is a new product which has been developed by SmartPly Europe¹⁹⁵. It is used by contractors who have been seeking an FSC certified, high quality, secure site barrier product which is locally produced and manufactured. It provides a cost effective, environmentally friendly alternative to imported plywood. In September 2009, Coillte Panel Products (CPP) won the Timber Trades Journal (TTJ) Excellence in Marketing Award¹⁹⁶ for its promotional /marketing campaign which supported the launch and promotion of SiteProtect.

6.11 UK promotional campaign for Irish sawn timber

In October 2009, Irish sawmills exhibited at Interbuild¹⁹⁷, a major construction show held at the National Exhibition Centre (NEC), Birmingham, UK. The show was attended by 26,639 trade visitors¹⁹⁸. The

¹⁸⁷ http://www.seai.ie/Your_Business/Inside_the_Smart_Economy/Inside_the_Smart_Economy_report.pdf

¹⁸⁸ <http://www.itga.ie/docs/MTSSApril2010.pdf>

¹⁸⁹ <http://www.arb.ca.gov/toxics/compwood/factsheet.pdf>

¹⁹⁰ http://www.flakeboard.com/docs%5Cenvironmental%5CCPA_CARBFactsheet.pdf

¹⁹¹ <http://www.arb.ca.gov/toxics/compwood/compwood.htm>

¹⁹² http://www.medite-europe.com/en/news_item.php?item=102

¹⁹³ <http://hsa.newsweaver.co.uk/newsletter/1onhgngx28o>

¹⁹⁴ <http://www.smartply.com/siteprotect/>

¹⁹⁵ www.smartply.com

¹⁹⁶ http://www.tjonline.com/story_attachment.asp?storycode=60514&seq=10&type=P&c=1

¹⁹⁷ www.interbuild.com

¹⁹⁸ Source: Swiss Trade Office, London (2009)

sawmillers which participated in this ‘structural export drive’ were ECC Timber Products¹⁹⁹, Glennon Brothers²⁰⁰ and Murray Timber Group (MTG)²⁰¹. This marketing endeavour was supported by both Coillte²⁰² and by Enterprise Ireland²⁰³.

6.12 Wood Fuel Quality Assurance (WFQA) scheme²⁰⁴

A new quality scheme for wood fuel products was launched in 2009/2010. This scheme is based in the Irish Bio Energy Association (IrBEA)²⁰⁵ and involves wood fuel producers and a number of Government Agencies. These include the Department of Agriculture, Fisheries & Food (DAFF)²⁰⁶, the Sustainable Energy Authority of Ireland (SEAI²⁰⁷) and the National Standards Authority of Ireland (NSAI²⁰⁸). It is anticipated that wood fuel certified under this scheme will come to market in September 2010.

¹⁹⁹ www.ecc.ie

²⁰⁰ www.glennonbrothers.ie

²⁰¹ www.mtg.ie

²⁰² www.coillte.ie

²⁰³ www.enterprise-ireland.com

²⁰⁴ [http://www.wfqa.org/userfiles/wfqa/JOB%20WFQA%20%20SEI%20Bioenergy%20News%20Autumn%202009\(1\).pdf](http://www.wfqa.org/userfiles/wfqa/JOB%20WFQA%20%20SEI%20Bioenergy%20News%20Autumn%202009(1).pdf)

²⁰⁵ www.irbea.org

²⁰⁶ www.agriculture.gov.ie

²⁰⁷ www.seai.ie

²⁰⁸ www.nsai.ie

7.0 Tables

7.1 Economic Indicators

7.1.1 An Economic Overview of the Irish Economy (2001 – 2010) ^{209,210}

Criteria /year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010f	2011f
Output - real annual growth %											
Government spending	9.8	7.1	3.2	1.8	4.6	5.3	6.9	2.2	-4.4	-4.0	-3.0
Personal consumption	5.4	3.8	3.2	3.8	6.6	5.7	5.9	-15	-7.0	0.25	1.5
Exports	8.6	4.5	0.5	7.3	3.9	4.4	8.6	-0.8	-4.1	5	4.75
Imports	7.2	2.4	-1.2	8.6	6.5	4.4	5.6	-2.9	-9.7	0.75	3.5
Consumer Price Index (CPI)	4.9	4.6	3.5	2.2	2.4	4.0	4.9	4.1	-4.5	-0.5	1.75
Gross Domestic Product (GDP)	5.7	6.0	4.3	4.3	5.5	5.7	6.0	-3.4	-7.6	0.25	2.75
Gross National Product (GNP)	3.8	2.8	5.5	3.9	5.3	6.5	4.4	-5.3	-11.4	0.25	2.5
Expenditure on Gross Domestic (GDP) & Gross National Product (GNP)											
GDP at market prices € billion	€116.8	€129.9	€138.9	€147.6	€161.2	€175.8	€189.8	€180.0	€159.6	€158.9	
GNP at market prices € billion	€97.8	€106.2	€117.2	€124.4	€135.9	€150.3	€161.2	€154.7	€131.2	€128.7	
Other economic variables											
Unemployment (As % of the labour force)	4.0	4.6	4.7	4.5	4.4	4.4	4.6	6.3	11.8	13.25	13.0

²⁰⁹ ESRI, Quarterly Economic Commentary, Summer 2010; http://www.esri.ie/UserFiles/publications/RB20100201/QEC2010Sum_ES_Summary%20Table.pdf

²¹⁰ f: Figures for 2010 and 2011 are forecast.

7.1.2 Irish construction output (2000 – 2010f) ^{211,212,213,214,215}

Sector /year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010f	2011f
Residential € billion	€9.5	€10.95	€11.93	€14.65	€18.06	€20.87	€23.4	€21.52	€15.12	€7.71	€2.10	€2.10
Non-residential € billion	€3.82	€3.71	€2.96	€2.73	€2.96	€3.42						
Productive infrastructure € billion	€3.06	€3.75	€4.58	€4.76	€4.83	€5.23						
Social infrastructure € billion	€1.2	€1.52	€1.82	€1.68	€1.75	€2.03						
Total output € billion	€17.58	€19.93	€21.29	€23.82	€27.6	€31.55	€36.00	€34.71	€28.53	€19.90	€15.12	€13.91
Percentage Residential	54%	55%	56%	61%	65%	66%	65%	62%	53%	39%	15%	14%
Housing Construction % GNP	9.2%	9.8%	10.2%	11.8%	13.6%	15.4%	15.5%	11.2%	7.3%	3.4%		
Annual House Building Cost Index ²¹⁶ 1991 = 100	141.0	161.5	171.8	176.5	181.5	186.9	194.2	201.7	209.4	206.4	207.8	
Increase on the previous year			6.4%	2.7%	2.8%	3.0%	3.9%	3.9%	3.8%	-1.4%	0.7%	
Total construction inflation						4.1%	5.9%	1.8%	-6.9%	-8.5%		
New construction output						15.9%	3.5%	-1.3%	-15.3%	-38.9%	-24%	-8%
Repair & maintenance						5.7%	12.5%	6.4%	8.8%	-20.6%		
Total construction output						13.9%	5.1%	0.2%	-10.3%	-38.0%	-24.0%	-8.0%

²¹¹ <http://www.environ.ie/en/PublicationsDocuments/FileDownload.21120.en.pdf>

²¹² Central Statistics Office; www.cso.ie

²¹³ ESRI Quarterly Economic Commentary; Summer 2009 & Summer 2010; www.esri.ie

²¹⁴ <http://www.irishconstruction.com/page/2372>

²¹⁵ http://www.qnhsireland.net/statistics/ann_house_building_cost_index.htm

²¹⁶ http://www.qnhsireland.net/statistics/ann_house_building_cost_index.htm

7.1.3 Forest products production in Ireland (2005 – 2011f) ^{217,218,219}

Category	Unit	2005	2006	2007	2008	2009	2010 f	2011f
Roundwood	1000 m ³	2,649	2,671	2,710	2,232	2,348	2,700	2,800
Coniferous	1000 m ³	2,630	2,654	2,682	2,203	2,312	2,650	2,750
Non-coniferous	1000 m ³	19	17	27	30	36	50	60
Wood fuel, including wood for charcoal	1000 m ³	20	15	32	52	87	100	125
Coniferous	1000 m ³	5	5	12	24	54	55	75
Non-coniferous	1000 m ³	14	11	20	28	33	45	50
Industrial roundwood (wood in the rough)	1000 m ³	2,629	2,656	2,678	2,180	2,262	2,600	2,675
Coniferous	1000 m ³	2,625	2,650	2,671	2,179	2,259	2,595	2,665
Non-coniferous	1000 m ³	4	6	7	1	3	5	10
Sawlogs and veneer logs	1000 m ³	1,763	1,789	1,725	1,359	1,497	1,810	1,875
Coniferous	1000 m ³	1,759	1,782	1,718	1,358	1,494	1,805	1,865
Non-coniferous	1000 m ³	4	6	7	1	3	5	10
Pulpwood (round & split)	1000 m ³	759	760	828	734	678	700	700
Coniferous	1000 m ³	759	760	828	734	678	700	700
Non-coniferous	1000 m ³	0	0	0	0	0	0	0
Other industrial roundwood	1000 m ³	107	107	125	87	87	90	100
Coniferous	1000 m ³	107	107	125	87	87	90	100
Non-coniferous	1000 m ³	0	0	0	0	0	0	0
Wood chips and particles	1000 m ³	562	606	545	523	516	643	666
Wood residues	1000 m ³	236	254	229	169	167	208	216
Sawnwood	1000 m ³	1,015	1,094	985	696	774	959	994
Coniferous	1000 m ³	1,014	1,091	981	696	772	956	989
Non-coniferous	1000 m ³	1	3	4	1	2	3	5
Of which: tropical	1000 m ³	0	0	0	0	0	0	0
Wood-Based Panels (WBP)	1000 m ³	875	937	918	779	709	730	730
Particle board (including OSB)	1000 m ³	435	436	440	377	329	380	380
Of which: OSB	1000 m ³	307	308	310	270	274	320	320
Fibreboard	1000 m ³	440	501	479	402	380	350	350
Hardboard	1000 m ³	0	0	0	0	0	0	0
MDF (Medium Density Fibreboard)	1000 m ³	389	413	396	340	340	300	300
Insulating board	1000 m ³	0	0	0	0	0	0	0
Other fibreboard	1000 m ³	51	88	83	61	40	50	50
Recovered paper	1000 mt	443	444	458	448	471	485	500
Paper and paperboard	1000 mt	45	0	0	0	0	0	0
Packaging materials	1000 mt	45	45	45	45	45	45	45
Case materials	1000 mt	45	45	45	45	45	45	45

²¹⁷ EUROSTAT / Irish JQ1 Return (2010).

²¹⁸ F: figures for 2010 & 2011 are forecast.

²¹⁹ These figures are in cubic metres under bark.

7.1.4 Irish Timber Imports and Exports (2007 - 2009)

The breakdown of Irish forest product imports and exports for the period 2007 to 2009 are shown in Table 30.

Table 30: Irish timber imports and exports (2007 - 2009) ²²⁰

Product	Imports					
	000 m ³			€ million		
	2007	2008	2009	2007	2008	2009
Sawnwood	724	412	232	€251	€141	€66
WBP	358	264	181	€146	€108	€68
	000 t			€ million		
Pulp products	31	29	32	€22	€20	€22
Paper & paperboard products	546	526	379	€467	€520	€308
Total				€886	€789	€464
	Exports					
	000 m ³			€ million		
	2007	2008	2009	2007	2008	2009
Sawnwood	381	389	564	€71	€54	€51
WBP	757	614	580	€262	€195	€147
	000 t			€ million		
Pulp products	0	2	0	€0	€0	€0
Paper & paperboard products	85	77	45	€92	€69	€45
Total				€425	€318	€243

²²⁰ Source: Central Statistics Office (CSO); www.cso.ie

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