South Australian Forest Industry Strategy

Vision 2050

Strategic Directions 2011 - 2016

Forest Industry Development Board

Edition: September 2011

This document is printed on **Onyx Embossed** paper.
Onyx is Australian made and 100% recycled
- a combination of 60% pre consumer and
40% post consumer waste with the recycled pulp
brightened in a PCF environment.
Onyx is produced in an ISO14001 accredited facility,
is FSC Recycled CoC certified, and endorsed
Carbon Neutral by Department of Climate Change (DCC).

Recycled

Australian made

ISO 14001 Accredited Facility

ISBN: 978-0-646-56700-6

The South Australian Forest Industry

The South Australian forest industry encompasses:

- plantation forest growing
- forest-related natural resource management
- environmental services
- research and development
- workforce and training
- public recreational use and tourism
- timber harvesting and haulage
- processing and manufacturing
- marketing and use of forest products.

Major products from the industry include: primary-processed wood products used in building and construction, furniture manufacture and other higher-value products, pulp and paper products, bioenergy and biofuels, and engineered wood products.

The Forest Industry Development Board

The South Australian Forest Industry Development Board is an advisory board established by the Minister for Forests on 1 January 2009. It aims to provide leadership for innovation and development of a forest and forest products industry that supports sustainable economic growth in South Australia. To achieve that, the major roles of the Board are to:

- meet with industry organisations to discuss the development of the industry and regions and identify strategies to address issues or constraints
- convene forums of relevant industry groups to promote discussion of current issues, emerging trends and to generate synergies
- facilitate communication between groups servicing the forest and forest products industry
- advise on the most effective roles for industry and government and recommend priorities to achieve growth
- develop, review and support the implementation of a forest industry strategy in South Australia.

South Australian Forest Industry Strategy

Vision 2050

Strategic Directions 2011 - 2016

Forest Industry Development Board

Minister's Preface

Forestry is an integral part of South Australia's economy, the environment and its people. The forest industry plays an important role in the State by providing significant employment opportunities, incomes and economic diversity, particularly in rural and regional communities.

More than ever, the industry, government and the community are challenged to integrate economic growth, social wellbeing and environmental sustainability, and capture the opportunities in the transition to a low carbon economy.

This South Australian Forest Industry Strategy is the first of its kind for South Australia. The Strategy complements other key South Australian Government initiatives, including South Australia's Strategic Plan.

The Strategy highlights policy directions and opportunities for government and industry to grow the forest industry through investment and innovation in sustainable resources, processing capacity and products, markets and workforce development.

Government and industry will join forces to continue and build on efforts to improve the business environment, expand the plantation resource base, and provide the infrastructure for an innovative and competitive industry.

In particular, the State Government will seek to articulate its forest industry policy position to increase investor confidence in this State.

I am confident that the implementation of the Strategy will ensure all South Australians continue to benefit from the sustainable growth and future success of South Australia's forest industry.

I look forward to working in partnership with industry, through the Forest Industry Development Board, in achieving the industry's vision.

Hon Michael O'Brien MP
Minister for Forests

Chair's Foreword

The South Australian Forest Industry Strategy is the result of extensive consultation with stakeholders in industry, government and the community. The Forest Industry Development Board appreciates the significant participation and contribution that has been made to the development of this Strategy.

With Australia's longest history of plantation forestry development, South Australia's forest industry has many strengths including maximising its natural attributes and fostering an innovative 'can do' attitude.

There is significant scope to further increase the regional contribution of the industry by further investing in major value-adding activities such as sawn timber, pulp and paper manufacture, and in emerging markets such as carbon trading and biomass. There are also good opportunities to further integrate community capacity building with local value adding through farm forestry.

This Strategy provides direction for activities to achieve significant economic, social and environmental outcomes. The Board will champion the implementation of the Strategy by continuing to engage with a wide range of stakeholders from industry, government and the community.

Your participation and contribution are vital for the implementation of this Strategy. Only with support from industry, government and the community can appropriate actions be developed that will make a difference.

Dr Lyndall Bull
Chair, Forest Industry Development Board

Introduction

The long-term nature of the forest industry distinguishes it from other primary production systems with crop harvests occuring 10 to 35 years or more after planting. This requires a long-term vision and practical strategies to meet changing consumer expectations and deliver broad social, economic and environmental benefits.

The *South Australian Forest Industry Strategy* has been developed through extensive consultation with stakeholders across the forest industry, government and the community.

This Strategy sets out a vision and targets, articulates key directions and strategies, and identifies major opportunities for industry to work with government and community to strengthen the development of a sustainable future for the forest industry in South Australia. It is applicable to the entire forest product value chain – starting from the consumer and working back through processing to the growing of plantation forest resources.

This Strategy will focus on the industry's forest-growing, timber harvesting and processing components as well as the marketing and use of wood products in construction and other applications. It will also seek to further integrate the management of the industry with sustainable natural resource management and the multiple environmental and social benefits of forests.

This document is not a manuscript of solutions but a statement of intent by those interested in achieving a vibrant future for our forest industry. It endeavours to identify opportunities for industry, government and the community to work collectively to strengthen the development of the forest industry in South Australia.

This Strategy provides a platform to initiate steps of implementation to achieving a sustainable future of the forest industry.

Contents

Vision and Targets

Vision 2050

South Australia has an expanding plantation resource base supporting an internationally competitive forest industry that contributes significantly to economic growth, social wellbeing and environmental sustainability.

Strategic Targets

- **Increase the economic value of the forest industry.**
- **Strengthen the forest industry's contribution to the community.**
- **Enhance the forest industry's contribution to multiple environmental benefits.**

Strategic Directions for Industry Development: 2011 - 2016

Strategic Direction 1 – Enabling an open and competitive policy and business environment	
Strategies	**Code[a]**
1.1 Articulate the State Government's forest industry policy position	S5
1.2 Establish and participate in effective communication	W5
1.3 Remove unnecessary administrative and regulatory burdens in the industry	O9
1.4 Promote internationally competitive, consistent and efficient regulation of the industry in South Australia	T1, T3
Potential Indicators[b]: Release of South Australian policy developed in conjunction with industry; Forum established for two-way communication; Changed forest industry perceptions of South Australian business environment; South Australia's ranking in ease of doing business surveys.	

Strategic Direction 2 – Increasing investment in the industry	
Strategies	**Code**
2.1 Increase infrastructure investment in regional South Australia to support growth of the industry	O3, W4
2.2 Support forest industries entering emerging product markets	O1, O2
2.3 Expand plantation area and increase wood supplies to improve economies of scale	W1, T2
2.4 Attract and retain new investment in plantations and world class facilities	O2, W3
Potential Indicators: Changed forest industry perceptions of South Australian infrastructure; Percentage of South Australian forest industry turnover from emerging products; Area of South Australia plantation forest estate (softwood, hardwood); New capital investment in the South Australian forest industry.	

Strategic Direction 3 – Capturing new value-adding opportunities	
Strategies	**Code**
3.1 Seek new value-adding opportunities	O2
3.2 Encourage downstream processing activities	O2
3.3 Influence regional and local planning to increase industrial-scale and farm forestry opportunities	O9, T3
Potential Indicators: Percentage of South Australian forest industry turnover from new products; Percentage of South Australian forest output processed in Australia; Percentage of Natural Resources Management and Development Plans that allow for productive forest land uses.	

a. See code listings on page 12 "Critical Analysis of the Industry".

b. Potential indicators are listed to give examples of factors that may be considered to measure the implementation of the Strategy and the development of the industry.

Strategic Direction 4 – Encouraging industry innovation

Strategies	Code
4.1 Strengthen research, development and extension capacity, knowledge brokering and regional planning	03
4.2 Develop a national leadership focus and leverage South Australia's competitive advantages	04
4.3 Capitalise on innovation capacity to develop new products and continuously improve existing products, production efficiency and overall competitiveness	02, 03

Potential Indicators: South Australian total investment in forest industry research and development; Changed perceptions of forest industry; Percentage of South Australian forest industry turnover from new products and services.

Strategic Direction 5 – Fostering industry collaboration

Strategies	Code
5.1 Harmonise the operating environment between South Australia and Victoria	T4, 09
5.2 Support market development for forest industries including environmental services	01, 04
5.3 Establish an industry advisory committee to improve the effectiveness of industry representation	W5
5.4 Facilitate forest industry conferences and forums	W5

Potential Indicators: Extent of coherence between South Australian and Victorian regulations affecting the forest industry; Number of meetings of the industry advisory committee; Number of industry conferences and forums.

Strategic Direction 6 – Strengthening workforce development

Strategies	Code
6.1 Develop training and education opportunities to ensure a skilled and safe workforce across forest industries	03, W6
6.2 Develop industry-government training partnerships	03, W6
6.3 Support university-level training for existing and potential forest industry employees	08, W6

Potential Indicators: Percentage of primary industry skilled trainees working in the forest industry; Percentage of university-educated employees working in the forest industry; Number of forest industry apprentices and employees.

Strategic Directions for Industry Development: 2011 - 2016 *(cont.)*

Strategic Direction 7 – Promoting best practice forest management	
Strategies	**Code**
7.1 Increase certification of the forest and forest products industry in South Australia	O4, T6
7.2 Integrate plantations into drier landscapes	O3, O5
7.3 Actively promote regional responses on issues like climate change, bushfire management, biosecurity, transport planning and water policy	T1, T9
7.4 Be part of a consistent national, state and regional approach to water planning	W2, T1

Potential Indicators: Percentage of forests and forest processors certified in South Australia; Percentage of South Australian plantation estate outside South East and Mt Lofty Ranges regions; Percentage of Natural Resource Management and Development Plans which address key risks of concern to the forest industry; Plantation forestry treated appropriately in national water policies.

Strategic Direction 8 – Bench-marking industry performance	
Strategies	**Code**
8.1 Benchmark forest industry delivery against state and national policies and programs	O4, T1
8.2 Regularly report performance to South Australians	O6, W7
8.3 Actively represent South Australian interests at national and high level government forums	O4

Potential Indicators: Percentage of forest industry enterprises in South Australia adopting state and national policies and programs; Public perceptions of South Australian forest industries; Number and timeliness of South Australian forest industry performance reports.

Strategic Direction 9 – Improving public perception and understanding of the industry	
Strategies	**Code**
9.1 Strengthen community understanding of the benefits of plantation forests and forest industry	O4, O6
9.2 Share data, information and research results as well as industry experience	W5, W7
9.3 Better understand consumers and support market development for sustainable forest products and services	O2, O6

Potential Indicators: Number of forestry website hits; Demand for timber products; Number of South Australian forestry press releases and percentage published; South Australian forest industry turnover from new products and services.

Trends and Influences

South Australia's forest industry participates in a global market and is therefore influenced by trends and events around the world. These trends combined with national and state factors have implications for the South Australian forest industry.

Global Trends

- Increasing concern about climate change issues and interest in related opportunities
- Increasing application of value chain concept
- Changing dynamics of world trade
- Consumers' demand for product integrity
- Emissions trading schemes
- Emerging technologies that enhance value chain efficiencies
- Increasing social and environmental responsibilities
- Free trade agreements
- Easier access to imports
- Fluctuating exchange rates
- Combating illegal logging

National Influences

- National Forest Policy Statement
- Plantations for Australia: the 2020 Vision
- Farm Forestry National Action Statement
- National Indigenous Forest Strategy
- National Primary Industries Research, Development and Extension Framework
- National Water Initiative
- Skilled workforce shortages
- Reduced rate of plantation establishment
- Emerging carbon/biofuel markets and products
- Trade rules (anti-dumping)
- National associations
- Lobbying by industry
- Carbon market initiatives

State Plans and Factors

- South Australia's Strategic Plan
- South Australian Planning Strategy
- State Natural Resource Management Plan
- Regional Natural Resource Management Plans and their related plans
- Strategic Infrastructure Plan South Australia
- South Australia's Greenhouse Strategy
- Guidelines for Plantation Forestry in South Australia
- Managing the water resource impacts of plantation forests: A State-wide policy framework
- Changing nature of ownership of industry enterprises
- Skills For All: The strategic direction for voacational education and training in South Australia 2011-2014

South Australian Forest Industry Snapshot

Resource Base

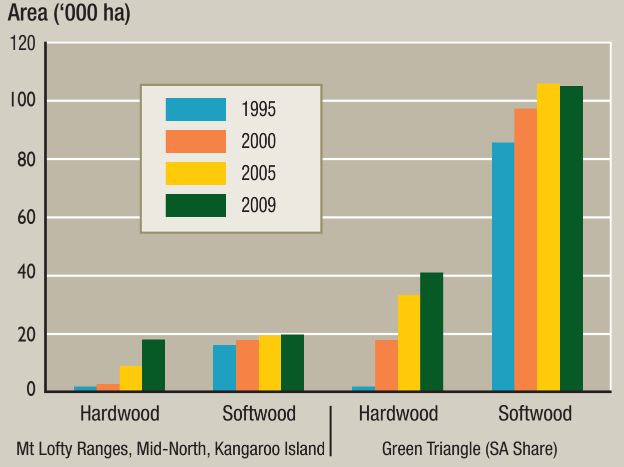
- 100% of timber production in South Australia is plantation-based.
- 188,100 ha of plantation resources - 128,400 ha of softwood and 59,700 ha of hardwood (12.5% and 6.1% of Australia's total respectively)[1 C].
- South Australia's share of the Green Triangle region (known as the Limestone Coast) is the largest plantation area. Other major forest regions are Kangaroo Island, Mount Lofty Ranges and the Mid North (Figure 1).
- About 7,600 ha of farm forestry plantations on 300 properties across the State are creating diversified income sources and contributing to a wide range of natural resource management benefits: biodiversity conservation, soil and water quality protection, carbon sequestration, stock and crop protection.
- The State's forest reserves provide multiple benefits including natural resource management outcomes, social values, environmental services, landscape amenity and recreation values.
- South Australia's softwood plantations are made up of mixed age classes that are able to support a wide range of forest products.

C. See full references on page 17.

Industry Structure

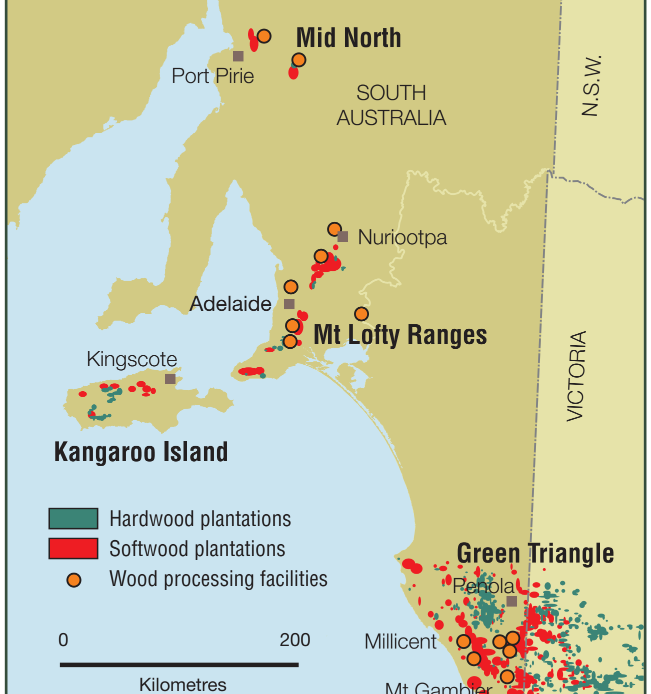
- The softwood industry is vertically integrated with significant areas of plantations supplying sawlog, engineered wood products, posts, pulp, paper and other forest products.
- Major processing centres are located in South Australia's share of the Green Triangle region at Millicent, Nangwarry, Tarpeena, Kalangadoo and various sites in and around Mount Gambier. Smaller but regionally important sawmills and processing facilities exist in the Mount Lofty Ranges, Mid North, Adelaide and on Kangaroo Island (Figure 2).
- The hardwood estate is currently focused on supplying export woodchip markets.
- A mix of markets for softwood in the Green Triangle region.

Figure 1: Area of South Australian Plantation Resources by Regions (1995-2009)



Source: National Plantation Inventories

Figure 2: South Australian Forest and Processing Regions

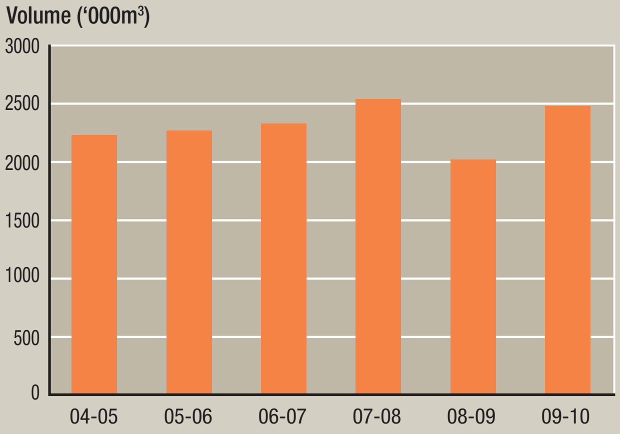


Source: PIRSA

Industry Operation

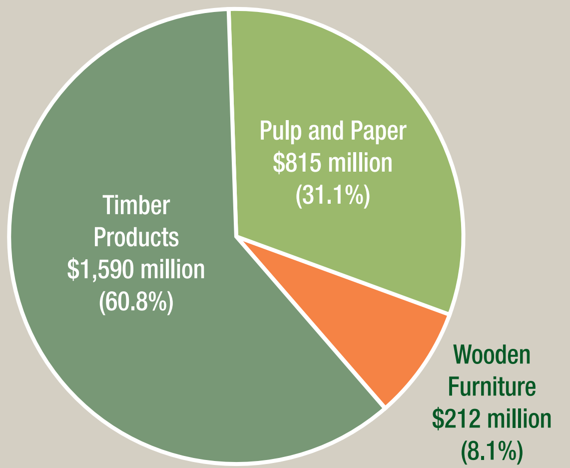
- 2.49 million cubic metres of plantation softwood logs are harvested each year (17.3% of Australia's total[2], Figure 3).
- The majority of softwood is processed into wood chip/pulp and paper (52%), high value sawn timber/veneer (46%) with the remainder used for preservation logs.
- Hardwood plantations are reaching maturity and will significantly increase production when harvested for export woodchips.
- Researchers, technicians and other support staff are undertaking tree breeding and plantation research and development (e.g. productivity management, growth and yield model development, forest health and wood properties).
- The industry has a history of being flexible to respond to a range of product opportunities.

Figure 3: Logs Delivered to Mill Gate, South Australia 2004-10



Source: ABARES 2011

Figure 4: South Australian Forest and Forest Products Manufacturing 2006-07 (Total turnover $2.6 billion)

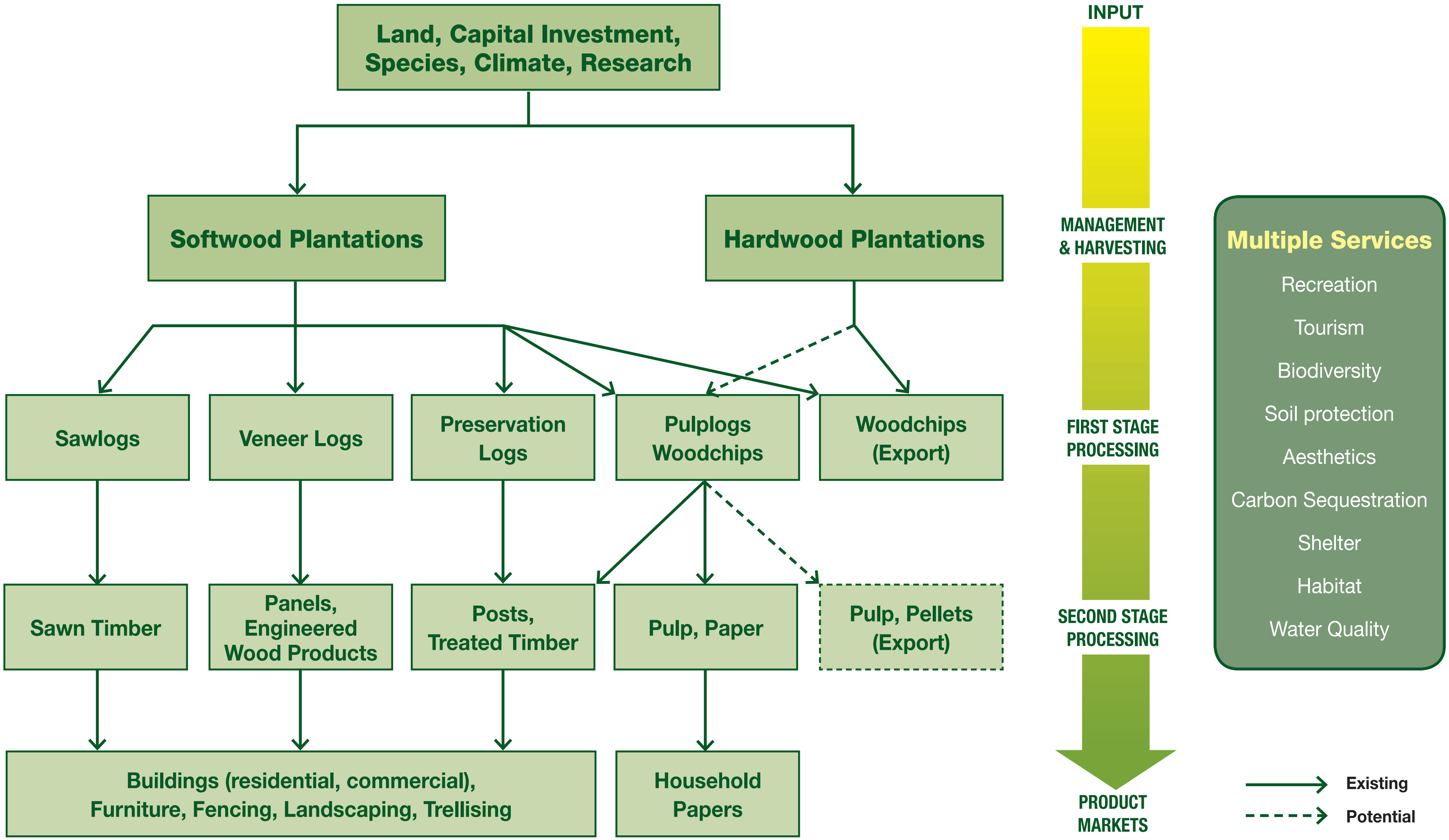


Source: ABS 2009

Industry Contribution

- $2.6 billion of goods and services were produced by the forest and forest products industry during 2006-07 (11.3% of Australia's total[3], Figure 4).
- 13,000 people are directly and indirectly employed in timber and wood processing activities (10.8% of Australia's total)[4].
- Forest industries play an important role in the development of regional communities (e.g., 28% of the Limestone Coast's Gross Regional Product is attributed to the forest and forest products industries)[5].
- Approximately 200,000 people visit the State's forest reserves for recreation each year.
- The economic benefit from organised recreation and tourism in the Mount Lofty Ranges and Mid North forests is estimated to be between $4 million and $6 million per annum[6].

Principal Forest Products and Services in South Australia



Critical Analysis of the Industry

Examining the current position of the industry and its working environment is an important part of the strategy development process. Through extensive consultation and industry input, the critical analysis outlined below provides information that is helpful in developing the industry's resources and capacities within the competitive environment it operates in.

Code	Strengths
S1	Climate and terrain support year round, cost-efficient harvesting
S2	Significant share of Australia's most integrated plantation industry in the Green Triangle
S3	A major contributor to Australia's plantation softwood resources that is integrated with value adding activity
S4	Considerable plantation hardwood resources reaching maturity for pulp production
S5	State Government support for a resource-based economy
S6	Experience gained from 135 years of plantation forestry and forest products development
S7	100% of all production from plantations
S8	Additional multiple use benefits including aesthetic values, water quality and significant recreational use of the State's forest reserves
S9	The ability of forests and forest products to help mitigate the effects of climate change
S10	Steady demand for softwood products
S11	A mix of value-adding industries and integrated supply managements
S12	Capacity in forestry tertiary education

Code	Opportunities
01	Emerging carbon trading and bio-energy markets
02	Further investment opportunities in major value adding activities
03	Investment in transport infrastructure, workforce development and local research and development to support industry growth
04	South Australia can lead the nation in best practice forest management, education, application of latest technology in forest harvesting, processing and waste management
05	Forestry can be integrated into farming landscapes to diversify incomes and support sustainable land management practices
06	Improved image and reduced community misconceptions
07	Increased certainty of log supply in Mount Lofty Ranges and Mid North
08	Increased pool of skilled labour competent to work in forest industry
09	Reduced red tape benefiting industry development and operation
010	Increased collaboration across the border in the Green Triangle

Code	Weaknesses
W1	Limited size of forest estate by international standards
W2	Lack of recent security of access to water resources
W3	Lack of capital investment in plantations and processing facilities
W4	Current manufacturing capacity and transport infrastructure may not support increased production levels
W5	A fragmented and relatively weak industry voice
W6	Shortage of skilled labour and professionals
W7	Lack of specific data for South Australian industry analysis
W8	Perception of changing ownership structures
W9	Limited research, development and extension capacity for forest industries at state and national levels

Code	Threats
T1	Increased regulatory regime for water
T2	Reduction in availability of competitively priced land
T3	Restrictive land use planning
T4	Competition from other forestry regions
T5	Uncertainty related to the ownership and management of state-owned plantations
T6	Shifts in consumer demand for wood and other forestry products and greater use of substitute products (e.g. steel framing)
T7	Increased international trade barriers
T8	Increased climate change, fire and bio-security threats
T9	Increasing imports of timber products and variable exchange rates
T10	Increased red tape

Industry Potential

There are existing and emerging opportunities to further develop the South Australian forest industry. It is useful to examine some of the key factors behind the potential growth of the industry.

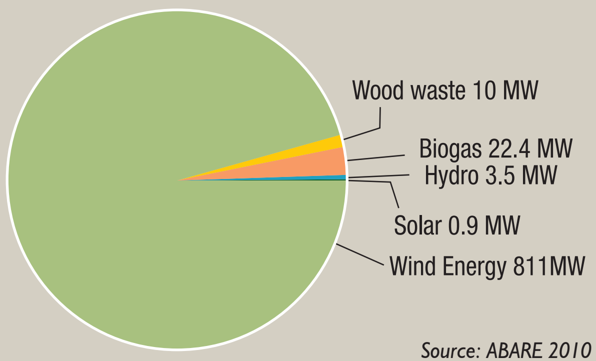
A National Leader

- South Australia led the way with plantations in Australia. It was the first State to establish plantations, investigate silvicultural options for their management, commission processing plants based on radiata pine. It then based its processing industry solely on plantations.
- South Australia was the first Australian state to legislate greenhouse gas emission reduction targets. The State is also heading towards a leadership role in its use of renewable energy as a share of electricity by 2020, with the proportion of wood waste currently being 10 times greater than solar[7] (Figure 5).
- Internationally, South Australia promoted and gained support for the Billion Trees initiative in Copenhagen in 2009.

Demand

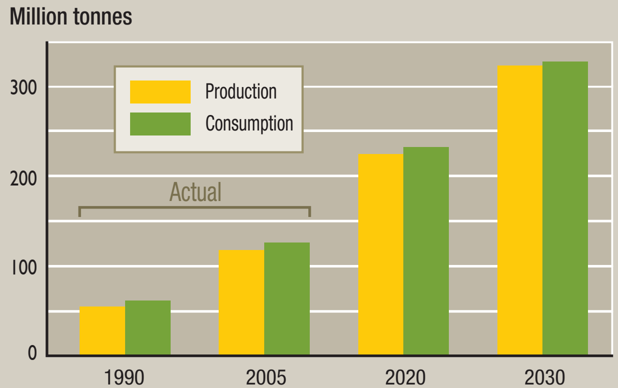
- Rapid economic growth and continuing population growth underpin a significant increase in demand for wood and paper products in Asia and the Pacific to 2030 as illustrated by the expected increase in consumption of paper and paperboard[8] (Figure 6).

Figure 5: Capacity of Renewable Electricity Generation in South Australia, 2009 (Total 847.8 MW)



Source: ABARE 2010

Figure 6: Asia and Pacific Production and Consumption Forecasts of Paper and Paperboard



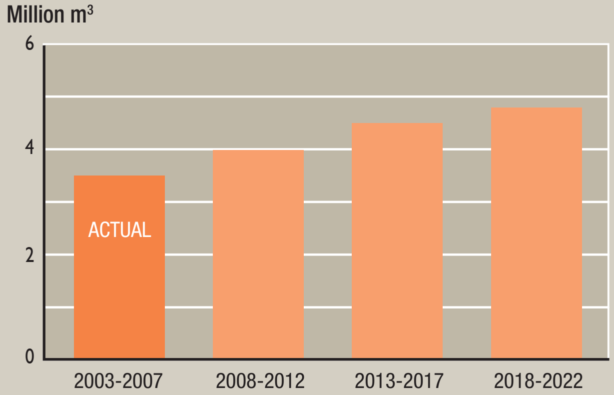
Source: FAO 2009

- Nationally, there is an expectation of increasing demand for softwood Australian sawntimber[9]. Greater use is consistent with Australia heading towards a low carbon economy, thereby increasing the preference for low energy intensive building products.
- Over the next decade South Australian energy consumption is forecast to increase by 0.9% annually[10], potentially based on renewable energy.
- National electricity generation from biomass (which includes plantation material) is expected to increase 2.3% per year between 2007-08 and 2029-30[11], assisted by the expanded Renewable Energy Target Initiative.
- Demand for Australian plantation woodchips is expected to continue, particularly from certified sources[12].

Supply

- Wood supply trends are dominated by plantation area, age and ease of harvest. On average the Green Triangle is more productive per hectare than commercial native forests interstate[13].
- Projections are for a small steady increase in softwood logs (Figure 7) and a substantial increase in hardwood pulpwood as the eucalypt plantations in South Australia mature[14].
- The average annual hardwood harvest over the next 10 years in the Green Triangle region is expected to be 3.8 million tonnes[15] (Figure 8).
- This is possible without impacting upon food, land and water availability.

Figure 7: Australian Softwood Sawntimber Demand Projections

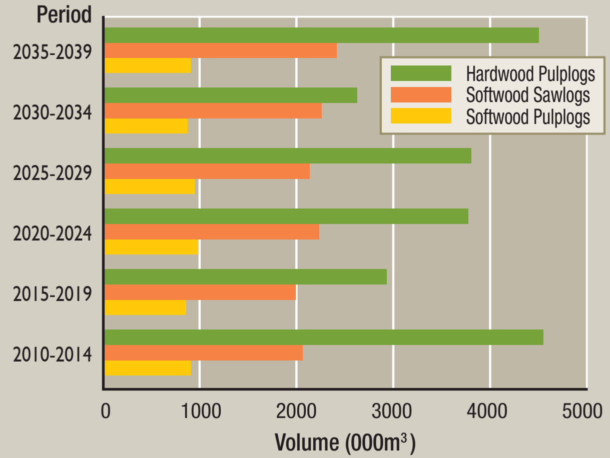


Source: BIS Shrapnel 2008

Grasping the Opportunities

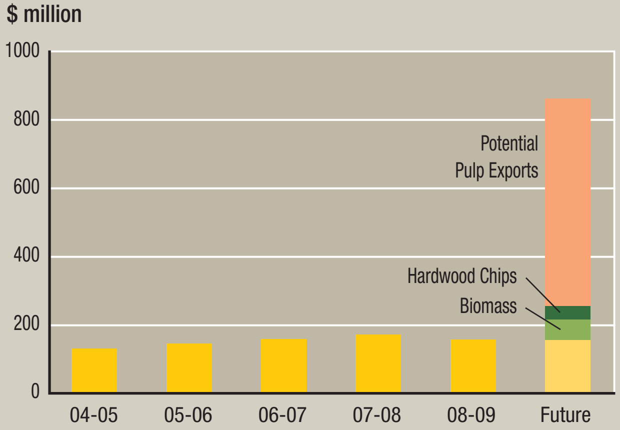
- The South Australian forest industry can continue to lead the way with best practice plantation management using its long and extensive experience in plantations, being part of one of the biggest contiguous plantations areas in Australia and having excellent terrain and climate for harvesting.
- The future export potential of the forest industry can increase significantly with the commissioning of new plants for producing pulp and biomass (Figure 9).
- Demand for wood pellets for electricity generation globally is projected to double by 2014, driven by government targets for converting to renewable energy sources in Europe and the United States[16].
- There continue to be opportunities for import replacement of forest and forest products being part of an industry with a trade deficit nationally of $2.1 billion[17].
- Further carbon sequestration opportunities and biomass energy ventures may arise if a carbon market is introduced in Australia.
- New value adding opportunities such as engineered wood products.

Figure 8: Forecast Log Supplies in the Green Triangle, 2010 - 2039



Source: Parsons et al, 2007

Figure 9: Current and Potential South Australian Wood Exports



Sources: ABS, DTEI and industry announcements

Achieving the Targets

South Australian Forest Industry Strategy

Three key targets have been identified to achieve the vision while taking into consideration the global market environment and the South Australian forest industry's competitive position.

Economic Target

Increase the value of the forest industry

The forest and forest products industry is a major contributor to the competitive strength of the South Australian economy, especially regionally. Current issues and emerging opportunities for the continuing prosperity and growth of the industry include: water management, transport and infrastructure, international competitiveness, farm forestry, hardwood value adding and investment certainty.

A coordinated effort is needed to address these issues and challenges to ensure contribution by the industry to State economic growth.

Social Target

Strengthen the industry's contribution to the community

The industry is of significant importance to many regional communities in South Australia. Current issues and emerging opportunities include: future skills requirement, workforce planning, attractiveness of regional areas, and industry social acceptance.

A coordinated effort is needed to address these issues and challenges to increase industry's contribution to the community.

Environmental Target

Enhance the industry's contribution to multiple environmental benefits

The continuing prosperity and growth of the industry offers a wide range of environmental benefits to the State. Plantation forestry can provide a wide range of environmental services including: mitigation of dryland salinity, carbon sequestration, and positive contributions to soil and water quality.

Although important for the State's productive future, these important services are currently unpriced. An enhanced understanding and appreciation of these multiple benefits is required.

Economic Outcome

South Australia continues to take advantage of opportunities in international and domestic markets.

Social Outcome

South Australia remains at the forefront in the production of safe, reliable and sustainable forest products and services to meet consumer needs.

Environmental Outcome

South Australia manages the use of plantation resources to ensure sustainable management of forest industries for future generations.

The South Australian Forest Industry Strategy will contribute to meeting the following targets in South Australia's Strategic Plan (2011).

Target 35 Economic growth	Target 20 Bushfire preparedness	Target 59 Greenhouse gas emissions reduction
Target 37 Total exports	Target 21 Greater safety at work	Target 62 Climate change adaptation
Target 38 Business investment	Target 23 Social participation	Target 64 Renewable energy
Target 39 Competitive business climate	Target 46 Regional population levels	Target 70 Sustainable land management
Target 47 Jobs	Target 78 Healthy South Australians	Target 72 Nature conservation
Target 95 Industry collaboration, research and development commercialisation	Target 93 Tertiary education and training	Target 75 Sustainable water use

Implementing the Strategy

Government

The role of the South Australian Government is to facilitate sustainable economic growth as well as protect and enhance the social and environmental goals outlined in South Australia's Strategic Plan. Overarching responsibilities include: provision of public infrastructure, land use planning, industry development, education, natural resource management across competing industries, provision of information and facilitation of administrative processes.

Areas in which the state government currently influences the forest industry include:

- policy
- regulation of water management
- energy
- environment
- transport and infrastructure
- labour and skills
- cross-border arrangements
- research and development
- red tape reduction
- owning major softwood plantation resources.

Industry

Industry's investment over the next few years will significantly determine its role in the national and international marketplace. Continued expansion of the area and productivity of the State's forest plantation resources will assist with global competitiveness and support value added processing capability. A cohesive whole of industry voice can be developed through the establishment of, for example, a South Australian forest industry advisory committee or similar body.

Areas where industry needs to play an important role include:

- capital investment
- support for research and development
- training and community awareness
- demonstrating the competitive environmental advantages of using forests and forest products
- improving investment models for industry development, resource security and sustainability
- improving the role of forest management and forest products in mitigating and adapting to climate change.

Community

Community involvement in the implementation of a forest industry strategy will help to achieve broad and enduring strategic outcomes. Working in partnership with government and industry gives community members a better understanding of the perspective and constraints of others, and builds mutual credibility and respect. It also allows for improved and ongoing information exchange through well-developed networks.

Areas where the community can participate include:

- increasing awareness and understanding of forestry through education, informing community, and connectivity with other primary industries
- convening of public meetings and field visits to identify and overcome forest industry development and management issues
- establishing regional community advisory groups to work with government and industry to develop forest management agreements
- strengthening community services such as developing collaborative fire plans.

Further Information

Next Steps

To be successful, the critical next steps in implementation of the Strategy include:

- communicate the Strategy with industry, government and community
- continue dialogue with regional communities and industry to progress implementation of the Strategy
- pursue implementation through a whole of government and industry partnership approach
- facilitate effective action on the ground
- monitor progress and review the Strategy by 2016.

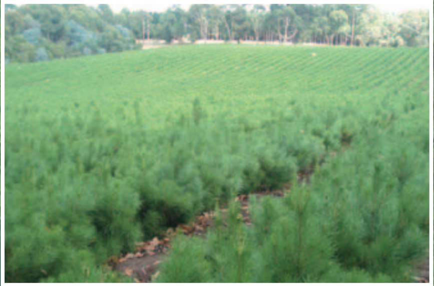
The Forest Industry Development Board is committed to providing opportunities for you to be engaged in the implementation process. PIRSA Forestry is working with the Board to facilitate the implementation of the Strategy. You are encouraged to contact the Executive Officer to discuss how to contribute.

For further information on the Strategy and its implementation, please visit:
www.pir.sa.gov.au/foreststrategy
or
contact the Executive Officer, Forest Industry Development Board

Postal address: GPO Box 1671, ADELAIDE, SA 5001
Office location: Level 9, 101 Grenfell Street, ADELAIDE, SA 5000
Phone: (08) 8463 6116 • **Fax:** (08) 8463 3366 • **Email:** forestindustrystrategy@sa.gov.au

References

1. Gavran, M and Parsons, M (2011), *Australian Plantation Statistics 2011*, Australian Bureau of Agricultural and Resource Economics and Sciences, Canberra.
2. ABARES (2011), *Australian Forest and Wood Products Statistics*, September and December quarters, Canberra.
3. Australian Bureau of Statistics (2009), *Manufacturing Industry South Australia, Industry Class by State and Region 2006-07*, Canberra.
4. ForestWorks (2006), *Forest and Wood Products Industry Workforce and Industry Data Collection Survey Report,* Melbourne.
5. EconSearch (2008), *The Timber Industry and Lower Limestone Coast Water Allocation Planning: Socio-Economic Aspects*, Adelaide.
6. EconSearch (2010), *Economic Impact of Timber Industry in Mount Lofty Ranges and Mid North Regions of South Australia 2008-09*, Adelaide.
7. ABARE (2010), *Energy in Australia 2010*, Canberra.
8. Food and Agriculture Organisation of the United Nations (2009), *State of the World's Forests 2009*, Rome.
9. BIS Shrapnel Pty Ltd (2008), *Sawn Timber in Australia 2008-22*, Sydney.
10. Australian Energy Market Operator (2010), *South Australian Supply and Demand Outlook*, Melbourne.
11. Syed, A, Melanie, J, Thorpe, S and Penney, K (2010), *Australian energy projections to 2029-30*, ABARE research report 10.02, Canberra.
12. Pechey, L (2010) *"The Outlook for Softwood Sawntimber and Hardwood Chips in Australia"* in Proceedings of the Australian Forest Growers National Conference "Integrating Our Resources", 10-13 October 2010, Mount Gambier.
13. Commonwealth of Australia, DAFF Website (2010) http://www.daff.gov.au/forestry/plantation-farm-forestry/management Accessed 22 October 2010.
14. Parsons, M, Frakes, I and Gavran, M (2007), *Australia's Plantation Log Supply 2005-49*, Bureau of Rural Sciences, Canberra.
15. Green Triangle Regional Plantation Committee (2009), *Future Wood Flows Across the Green Triangle Region – Towards 2020*, Mount Gambier.
16. Taylor, R (2010), *Wood Markets Monthly International Highlights Report*, Vancouver.
17. Cunningham, D (2011) *"Australia's Role in Asia-Pacific Forestry"* in Proceedings of the ABARES Outlook Conference, 1-2 March 2011, Canberra.




www.pir.sa.gov.au/foreststrategy