

Timber Industrial Strategy

About HBF

The Home Builders Federation represents home builders in England and Wales. HBF's members build the majority of new homes built in England and Wales each year. Its membership includes national developers and hundreds of SME builders.

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Consultation Questions:

1. Increasing timber supply

- i. **How can the sustainable forest resource grown in Wales, be increased to make more timber and wood fibre available for the future?**

It is the opinion of the Home Builders Federation that Welsh Government via the Sustainable Farming Scheme (SFS) provide clearer and greater financial incentive and strategic support for the promotion of sustainable woodland and tree planting in Wales. It is understood that global demand for timber will increase 400% by 2050. The UK is the third largest importer of timber in the world importing around 80% of the timber it requires when it only utilises around 40% of the wood that is currently available here to use. Welsh Government should create and support a home grown timber industry to address the increasing overseas demand and competition for wood. Welsh and UK Government should promote the use of more C16 grade UK softwood than C24 specified foreign timber. Support for this should be promoted and carried out via the Welsh Government Woodland Estate (WGWE) and the UK Woodland Assurance Standard (UKWAS). Timber volumes need to be understood for changes in demand and supply. HBF believe that low level, low span housing is perfectly placed to respond to the Welsh Government Timber Industrial Strategy in Wales. Improving survey information and increasing the reliance of data will help Welsh government plan for strategic tree planting to the correct species in Wales. A mixed approach for the strategic provision of softwood and hardwood species will help the house building industry align with Welsh Governments aspirations for increasing tree planting whilst at the same time help to improve and promote tree planting practices across Wales.

Wales has seen a strategic tree felling operation carried out across large parts of the countryside and hillsides over the last 20 years. Larch disease, *Phytophthora Ramoran*, was first identified in 2002 in Wales and elsewhere. WG and Natural Resources Wales were legally obligated to respond with a 10 year tree felling program. Where poorer ground exists, less favourable to agriculture and arable farming, there exists a strategic opportunity for WG to promote and deliver strategic tree planting to align with industrial and housing requirements which could include native broad leaf deciduous species in addition to quicker growing spruce and larch timber species. Welsh Government should make the most of the temperate climate that Wales enjoys to promote species of wood that can be increased in planting, growth, felling and production to align with the projections in increasing demand.

ii. How can volumes of Welsh timber and wood fibre coming to market be increased?

It is our opinion that WG should do more to encourage private land owners to embrace strategic tree planting to help deliver more timber framed homes in Welsh house building. WG should provide mechanisms, support, licensing and education towards the encouragement of native tree planting in Wales on land that particularly suited towards tree planting and timber wood fibre delivery. Regulations and standards in building regulations are changing. WG should encourage the use of Welsh timber into new homes built in Wales. Certification schemes including recognition towards suitable and adequately tested timber strengths should be provided by Welsh government. Promotion to landowners via certification, licensing and approvals should be encouraged by WG in order to increase the level of tree planting in Wales. At the same time greater encouragement, support, certification and approval for the increased use of timber should be promoted by WG to those operating in construction and Welsh house building. WG should encourage more timber use within the framework, structure and finishing elements of new house building via home building policies and UK recognised certification, insurance and warranty schemes. In order to increase the use of Welsh Timber. Accreditation, insurance and warranty providers with Welsh government involvement should recognise workmanship, quality, health and safety, species of acceptable timber, timber use in new homes and installation methodology of Welsh timber in home building.

Improved geographical land ground surveying could identify which species are best placed to grow in different climate and soil conditions in Wales. Poorer unutilised ground could be promoted for strategic tree growth and re-seeding to align with WG aspirations for increasing timber plantations for construction.

Welsh Government could consider Nature Restoration funds being allocated towards a strategic approach to tree planting in Wales. Home building, commercial, industrial and business development could be permitted where contributions could be made for the beneficial improvement of strategic tree planting. Where landscaping, ecology restoration and nature provision is lost or requires offsite contribution elsewhere, WG could consider aligning business and growth opportunities with strategic 10, 20 or 30 year tree planting

functions in suitable areas that combine to support WG timber industrial strategy with management and care carried out by NWR and Welsh Government Woodland Estate.

2. Increasing resilience in our forests

i. What actions can be taken in Wales to reduce the risks to our forests posed by climate change and pests and diseases?

It is the opinion of Home Builders Federation that newly formed organisation such as those of the Tree Planting Taskforce launched at the end of November 2024 and the National Forest for Wales will help play their role in the promotion and planting of millions of new trees across the UK to help meet the UK zero carbon targets by 2050 in addition to the replacement of trees felled for timber production. Regular woodland management including tree planting, inspection, surveying and felling will help control other aspects of nature damage such as those posed from pests, pathogens, fungus and air borne disease. WG should consider a range of differing species so that not one particular source becomes too vulnerable to disease. In addition to native species, WG could consider those timber species most suited to deliver against the governments targets for timber industrial strategy and felling. Regular tree planting across a 20 to 30 year period would reduce vulnerability whilst at the same time deliver the needs of timber in construction and the timber industrial strategy of WG. More site specific ground and soil surveys including Ai and eDNA can best match tree species types with soil and light conditions, particularly across the vastly varying range of geographic locations including mountainous, valley, shaded and exposed locations across Wales.

ii. How can growers and nurseries accelerate the implementation of adaptation measures?

The HBF believes that WG should increase support and research into soil and topographical studies of the land in order to support and sustain long term strategic tree planting in the right areas. This will place the country in the best position to respond most effectively. Increasing knowledge, sharing ideas and working with researchers on understanding ground, soil and geotechnical matters will also help growers and nurseries become more effective in tree planting for WG and industry targets. Having planted species that support wildlife are native to the UK and northern hemisphere but also align with those used in the construction industry and home building could help promote and encourage greater uptake of tree planting and managed woodlands in Wales.

3. Resource efficiency and circular economy

i. What actions could be taken in Wales to encourage reuse and recycling of wood to minimise waste?

HBF believe that promoting and innovating towards even greater use of timber in house building use by WG could help encourage re-use and recycling in timber frame housing. Developers already recycle on site waste including timber in construction. WG support for on site re-use and on site collection of timber waste could help coordinate greater success for timber recycling on active construction sites.

ii. How could Wales promote innovation, to design and manufacture wood-based products with increased value, extended durability and climate resilience?

HBF believe that WG could encourage further exploration into the potential to re-use and re-manufacture timber based products before resorting to recycling. Home building already uses significant levels of timber in construction but there is the possibility of increasing this again with more timber frame homes and timber re-use or re-purposing on active construction sites. WG could look across the UK and abroad for examples of best practice in the use of timber in construction and highlight these through case studies to illustrate how to design new products with circularity in mind in new home building.

Welsh Government could work in partnership with home builders and stakeholders to develop and articulate a clear wood cascading protocol that should account for second and potentially third operational lives for Welsh grown timber and wood fibre for insulation and energy in new build homes.

4. Instilling confidence in demand

i. What actions could be taken in Wales to increase the use of timber and wood fibre in long-term uses, such as construction?

HBF believe that encouraging more timber use in construction and particularly new homes is well suited for reducing carbon significantly in building fabric in addition to the thermal and structural capabilities in low rise residential properties. Domestic structural construction - including use of timber frames and wood fibre for insulation and other purposes should be encouraged in new home buildings to deliver business and government carbon targets. Non-domestic or multi-storey residential Mass Timber Commercialisation such as Laminated or engineered timber products are particularly expensive to manufacture in the context of residential properties. It is HBF's understanding that these types of engineered timbers are better placed in more commercial buildings and associated specifications albeit there can be exceptions on occasions. It could be that engineered timber becomes more suitable over time with the decarbonisation of the national grid and as electrical energy prices continue to remain high in the fabrication of steel or concrete frame structures.

ii. How can we use home-grown timber and wood fibre to maximise local supply chain opportunities?

Welsh Government, structural and insurance institutions will need to collaborate to formally recognise UK timber as a recognised and accepted form of structural timber. Support for the acceptance and inclusion of more C16 grade timber over the more popular C24 imported timber generally from Scandinavia will need to be recognised in order for UK and Welsh grown timber to become more widely accepted in the fabric of new home building.

iii. How can Wales better align timber supply with market demand?

HBF believe that Welsh government should promote more timber frame in house building. This could be achieved through building regulation fabric and carbon performance. WG should provide a clear understanding to industry of the pathway through the timber supply

chain in UK home building and align its strategic approach to land promotion for woodland management, strategic tree planting, cyclical growing and felling periods along with the available associated industries required for felling, saw milling and production for use in industry. This clear pathway could help align the timber being offered to the market with the intended markets and end-products, also exploring greater use of alternative timber sales methods.

WG would need to provide industry with a strategic approach through policy towards more timber use in construction. This would help capitalise on market trends and demand for different material production from strategic tree planting and woodland management. Smoothing out the supply, processing, storage and drying out periods of timber manufacturing would help address the timing and scale of sales to better align timber availability relative to peak demand seasons. A mature supply line with a more strategic approach in Wales and the UK towards timber planting, felling, manufacturing would address and supply and demand issues reducing the likelihood of peak and trough pricing and demand.

5. Developing sector capacity

i. What challenges need to be addressed to improve recruitment and retention in forestry and timber industries in Wales?

The HBF believe that Welsh Government and industry need to promote more sustainable means of construction in new homes to appeal to the younger generation entering the various professions associated with woodland management and timber in construction. Greater use of MMC and off site manufacturing and preparation could see an increase in the use of timber use in construction carried out in clean, dry, well lit spaces as opposed to outdoor working in poor weather climates. Elements of offsite production and manufacturing in construction can bring about 30% to 50% improvements in speed and time compared with its equivalent of onsite construction. This all helps speed up the process and reduce time on site that can be beneficial to the construction industry especially during winter months when time is lost due to poor inclement weather. Promoting more MMC and offsite manufacturing could also go some way in addressing some of the challenges facing the industry to help promote greater timber uptake in construction. Government promotion and encouragement towards more Welsh timber and UK timber in construction will improve demand and drive up recruitment and retention in the timber industry. This needs to be supported by government through recognised skills training and certification routes to upskill and reward professionals working in the timber industry.

By increasing and encouraging more MMC in various forms in new home building including timber frame and engineered wood systems, Welsh government can boost productivity in house building while delivering high quality, energy efficient, warm homes at scale in line with Welsh government targets. Offsite manufacturing and certain elements of MMC fabrication in the context of home building can increase construction and build quality whilst at the same time improve elements of construction that are increasingly becoming more important such as air tightness and thermal insulation. These features are important to highlight as they play a significant role in home building, timber frame production and attracting more positions of employment within the offsite timber manufacturing industry associated with construction and in particular new home building.

ii. What gaps are there in forestry and timber training and skills provision in Wales?

The Home builders federation work with the CITB and wider industry towards improving the landscape for new entrants coming into the home building industry. To improve the use of UK and Welsh timber issues identified with current training programmes the HBF agree with WG that its needs to addressed by education institutions whom should then liaise with the forestry training providers to encourage the development tailored programmes to provide the skills to enable rapid uptake of innovation and new technologies. More needs to be done to encourage and attract more people into employment around tree planting, nurseries, woodland management in addition to traditional professions such as carpentry, joinery and construction based trades. A renewed approach to encourage more timber in construction is an ideal platform to rejuvenate enthusiasm in these areas and provide worthwhile professionally recognised employment.

HBF agree that a review of education and training programmes for timber use in construction should include timber grading and merchenting along with support towards the development of modern apprenticeships suited to the needs of the off-site timber industry whether that be land management, tree planting and forestry management through to professional felling, surgery and timbe manufacturing and processing. HBF agree that WG should work with the sectors to promote the integration of forestry and timber knowledge at an early age (pre-16) across the curriculum. WG should promote a collaborative approach to forestry working with other land-based sectors to stimulate interest in land and natural resources management careers in the same way that agricultural courses have been in practiced and recognised for so many years.

Industry and WG should develop a communications plan to promote the sector, with a focus on elevating its status and showcasing the professionalism and diverse opportunities it offers. This should be aligned with the same work being carried out in other areas of upskilling and industry promotion of home building where materials, MMC, trades and qualifications overlap into the use of timber. Here both industry and government could highlight the importance of interrelated industry activities and their co-dependency on one for a UK approach to planting, processing, construction and completion of Welsh homes.

iii. What actions are needed to support the development and adoption of new products, processes and/or technologies?

As the representative body of the house building industry, we do not feel we can comprehensively respond to this point and feel this is more appropriately responded to by sectors closer related to this area in Wales. HBF and the home building industry does support innovation, the development and adoption of new products, processes, technologies which are recognised and certified by industry approval bodies. A similar approach would be supported through timber frame use in home building with more MMC and offsite engineering and manufacturing supported by a Welsh timber approach to construction with Welsh Government.

With the launch of the 23 Welsh social landlords pattern book designs in collaboration from 11 councils and 12 housing associations in January, there exists an opportunity with Welsh timber to deliver quickly, efficiently and environmentally net zero quality new homes. The use of locally sourced, locally saw, milled, engineered timber will help stimulate demand for natural local materials. This in turn will help increase the number of high skilled workers in Wales.

Pattern book house types for 15 homes across 18 variants ranging from 1 bedroom flat to 4 bedroom homes in addition to 3 disabled accessible bungalows will help meet Welsh Development Quality Requirements in a sustainable and environmentally friendly way.

Fabric performance set at an ambitious entry level standard to AECB as well as LETI/Passivehaus Classic as an advanced position will help Welsh Government, developers and contractors achieve the standards utilising Welsh timber where permitted. Pattern book designs and standard details will help timber frame manufacturers build homes accurately and efficiently in Welsh timber frame factories located locally. This will help provide consistency across the counties and from housing association to housing association improving and aligning the high standards housing associations can expect to receive.

Contractors, builders and developers will be pricing against standardised house type designs and performance specifications. This will help create a transparent level playing field where both developers and housing associations can experience economies of scale and consistency in construction across the regions. This will also help reduce waste. Homes could be therefore built faster with less time lost on site to poor inclement weather whilst improving efficiencies and embracing more low carbon and low embodied carbon materials and technology.

6. Underpinned by behaviour change

i. What actions are needed to improve public understanding of productive forestry?

The HBF believe that enhancing and promoting the benefits of productive forestry and timber planting is of benefit to home building, nature, timber farming and growing the timber industry in Wales. HBF support the elevation of the timber industry and how it can help support home building in Wales. HBF believe that WG and industry have a part to play in raising the visibility of the opportunities for varied careers in the sector, including high-paid jobs and this is matched in similar roles within home building.

Productive forestry can help the public understand the best way for timber to play its part in carbon reduction and providing sustainable means of construction and house building. 25% of greenhouse gas emissions come from the built environment. Larger buildings can store up to 400% more carbon than concrete and masonry equivalent. Highlighting the benefits of timber in construction with the public will help elevate productive forestry as an established and worthwhile industry in Wales.

HBF supports that promotion and understanding of role that trees, timber and wood fibre's contribution make towards carbon sequestration and storage. This is demonstrated with changing building regulations and the enhanced standards that Wales requires on the journey

towards the Future Homes Standard. Understanding the need for materials to transition towards lower embodied carbon and the importance of timber in this role.

HBF encourage greater awareness of the health benefits of timber in construction apposed to the environmental issues associated with the overuse of concrete and carbon intensive products. HBF believe WG should encourage communication and promote understanding between different parts of the supply chain by working with industry and academic institutions linking the key critical roles played by e.g. foresters, sawmills, trades, architects, planning officials, building inspectors through to builders, carpenters and engineers in the delivery of new homes in Wales and the UK.

HBF believe that Welsh Government, warranty and insurance providers need to develop an awareness, recognition and acceptance though certification around the sometimes negative perceptions about the “quality” of Welsh and UK grown timber, demonstrating practical applications and uses in construction. This requires Government support and a UK transition towards more UK grown and supplied sources of material.

- ii. Do you support the proposal to establish an Industry Leadership Group in Wales? Yes/No**
 - a) If yes, what contribution could it make during the implementation of the Timber Industrial Strategy?**

HBF supports the proposal to establish an Industry Leadership Group in Wales. We believe the role should explore with Confor and the wider forestry industry towards the potential of setting up a similar Industry Leadership Group in Wales, led by the industry with public sector collaboration and support. Such a group could aid constructive dialogue and provide structured opportunities to discuss the industry’s needs and to identify opportunities where support and input from government, wider industry and the home building sector could add value.

- iii. Do you support the proposal to recruit a Chief Forester for Wales? Yes/No**
 - b) If yes, what added value would the role bring to the forestry sector in Wales?**

HBF in principal supports consideration towards a Chief Forester role in Wales should it be proven that a meaningful and effective position could deliver strategic change. The new role should see an increase in the use of timber in Wales along with promotion of land take up for strategic tree planting, improving skills, training, manufacturing, onboarding of professionals and industry recognition for Welsh and UK timber in home building was recognised by insurance, building control and warranty providers.

- 7. What, in your opinion, would be the likely effects of the proposals on the Welsh language? We are particularly interested in any likely effects on opportunities to use the Welsh language and on not treating the Welsh language less favourably than English.**
 - i. Do you think that there are opportunities to promote any positive effects?**

As the representative body of the house building industry, we do not feel we can comprehensively respond to this point and feel this is more appropriately responded to by sectors closer related to this area in Wales. In principal we don't believe there would be any effect on Welsh language or culture.

ii. Do you think that there are opportunities to mitigate any adverse effects?

As the representative body of the house building industry, we do not feel we can comprehensively respond to this point and feel this is more appropriately responded to by sectors closer related to this area in Wales. In principal we don't believe there would be any effect on Welsh language or culture.

8. In your opinion, could the proposals be formulated or changed so as to:

- **have positive effects or more positive effects on using the Welsh language and on not treating the Welsh language less favorably than English; or**
- **mitigate any negative effects on using the Welsh language and on not treating the Welsh language less favourably than English?**

As the representative body of the house building industry, we do not feel we can comprehensively respond to this point and feel this is more appropriately responded to by sectors closer related to this area in Wales. In principal we don't believe there would be any detrimental effect on either the Welsh or English language or culture.

9. We have asked a number of specific questions. If you have any related issues which we have not specifically addressed, please use this space to report them. Please enter here:

None.

Responses to consultations are likely to be made public, on the internet or in a report. If you would prefer your response to remain anonymous, please tick here:

We are happy for HBF's responses to be shared publicly.

HBF Wales.