



CAIRNS CONSULTATION FORUM

Tuesday 11 June 2019



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**Primary Industries and
Regional Development**



NORTHERN FORESTRY &
FOREST PRODUCTS
INDUSTRY SITUATION
ANALYSIS

Welcome & Introduction

- Strategic study into challenges and opportunities for forest and timber industry development in Northern Australia
 - Queensland, Western Australia and Northern Territory
- Desktop review and series of industry and stakeholder consultations
- Will inform future R&D, investment, policy and regulatory settings for growth
- Develop industry alliance and input to Northern Ministers forum



Project partners

- Timber Queensland (Qld)
- University of Sunshine Coast (Qld)

Funding co-contributors

- Simms Group (Qld)
- DTM Timber /Branch 95 (Qld)
- HQPlantations (Qld)
- NT Department of Primary Industries and Resources (NT)
- Midway (NT)
- Plantation Management Partners (NT)
- Quintis (WA)
- Alpha Santanol (WA)
- Forest Products Commission Western Australia (WA)



Forests in northern Australia, by forest type



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Department of Agriculture
ABARES

Native forest area (Mha)

Qld – 36 or 29%

NT – 24 or 19%

WA – 3.6 or 3%

Aus – 123 Mha

63 million ha of forests in
northern Australia

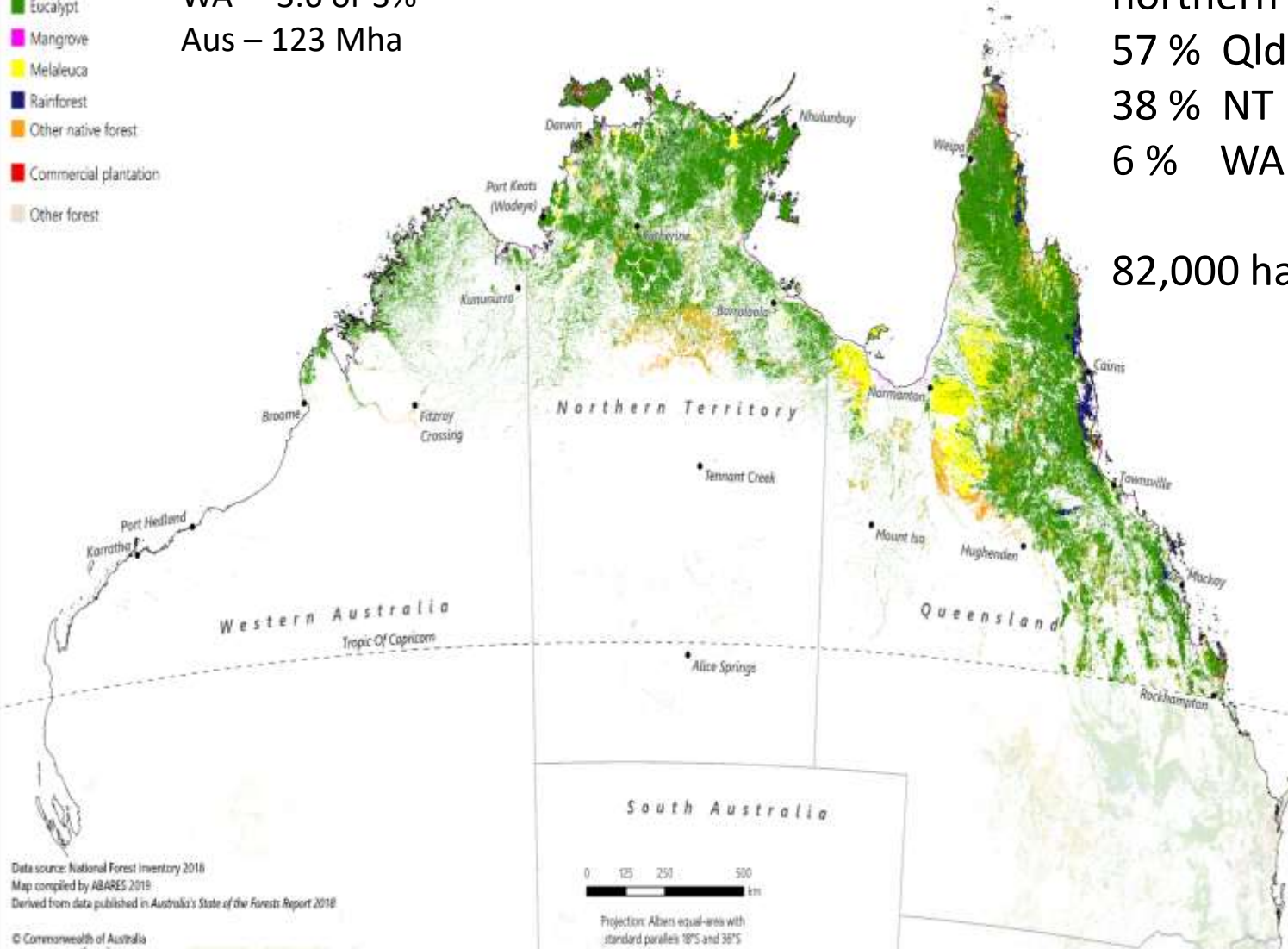
57 % Qld

38 % NT

6 % WA

82,000 ha of plantations

- Forest type**
- Acacia
 - Callitris
 - Casuarina
 - Eucalypt
 - Mangrove
 - Melaleuca
 - Rainforest
 - Other native forest
 - Commercial plantation
 - Other forest



Forest type



Data source: National Forest Inventory 2016
Map compiled by ABARES 2019
Derived from data published in Australia's State of the Forests Report 2018

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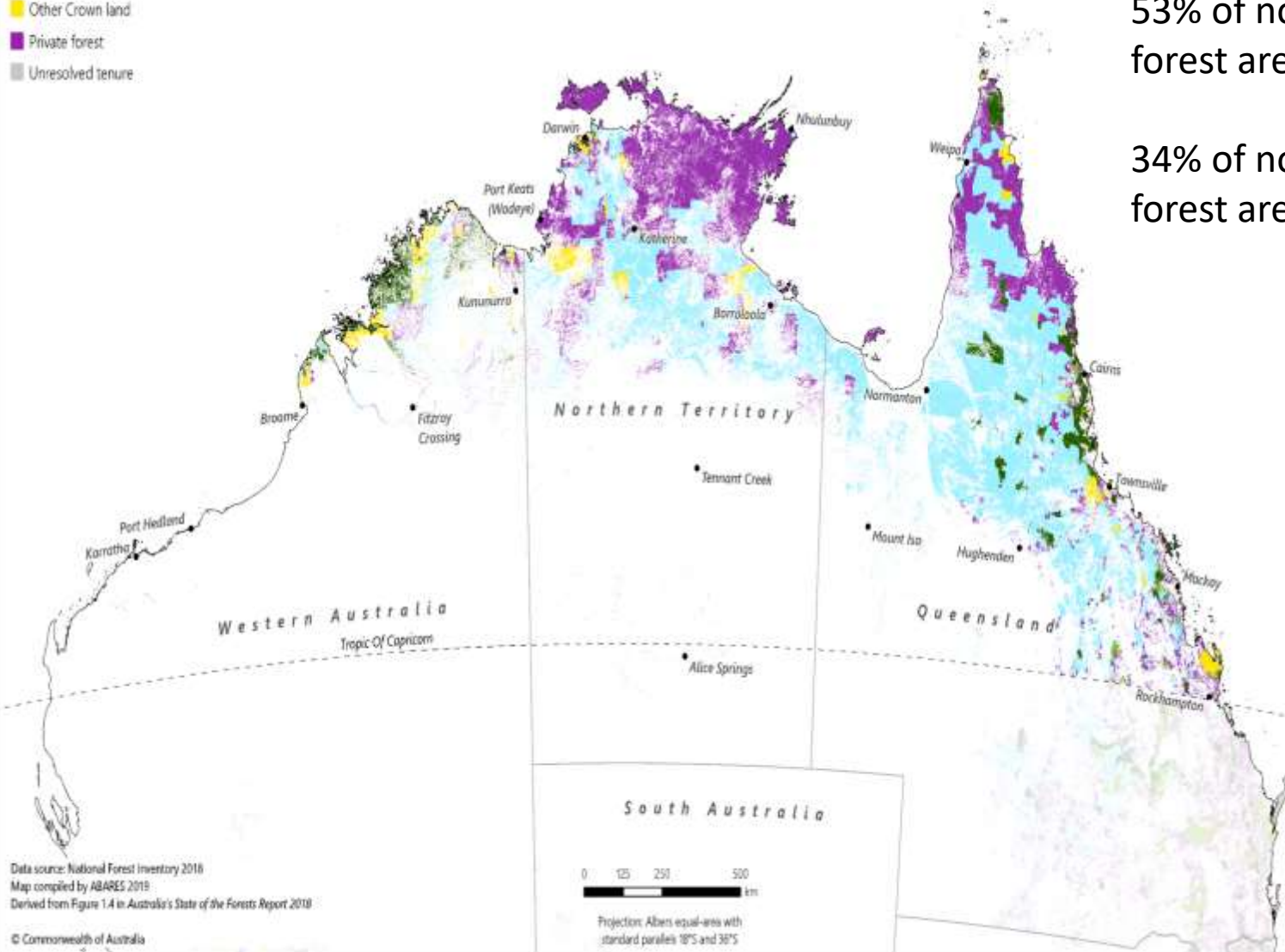
Forest tenure

Forest tenure

- Leasehold forest
- Multiple-use public forest
- Nature conservation reserve
- Other Crown land
- Private forest
- Unresolved tenure

53% of northern Australia forest area is leasehold

34% of northern Australia forest area is private forest



Data source: National Forest Inventory 2018
Map compiled by ABARES 2019
Derived from Figure 1.4 in Australia's State of the Forests Report 2018

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The Indigenous forest estate, by land ownership and management category for northern Australia



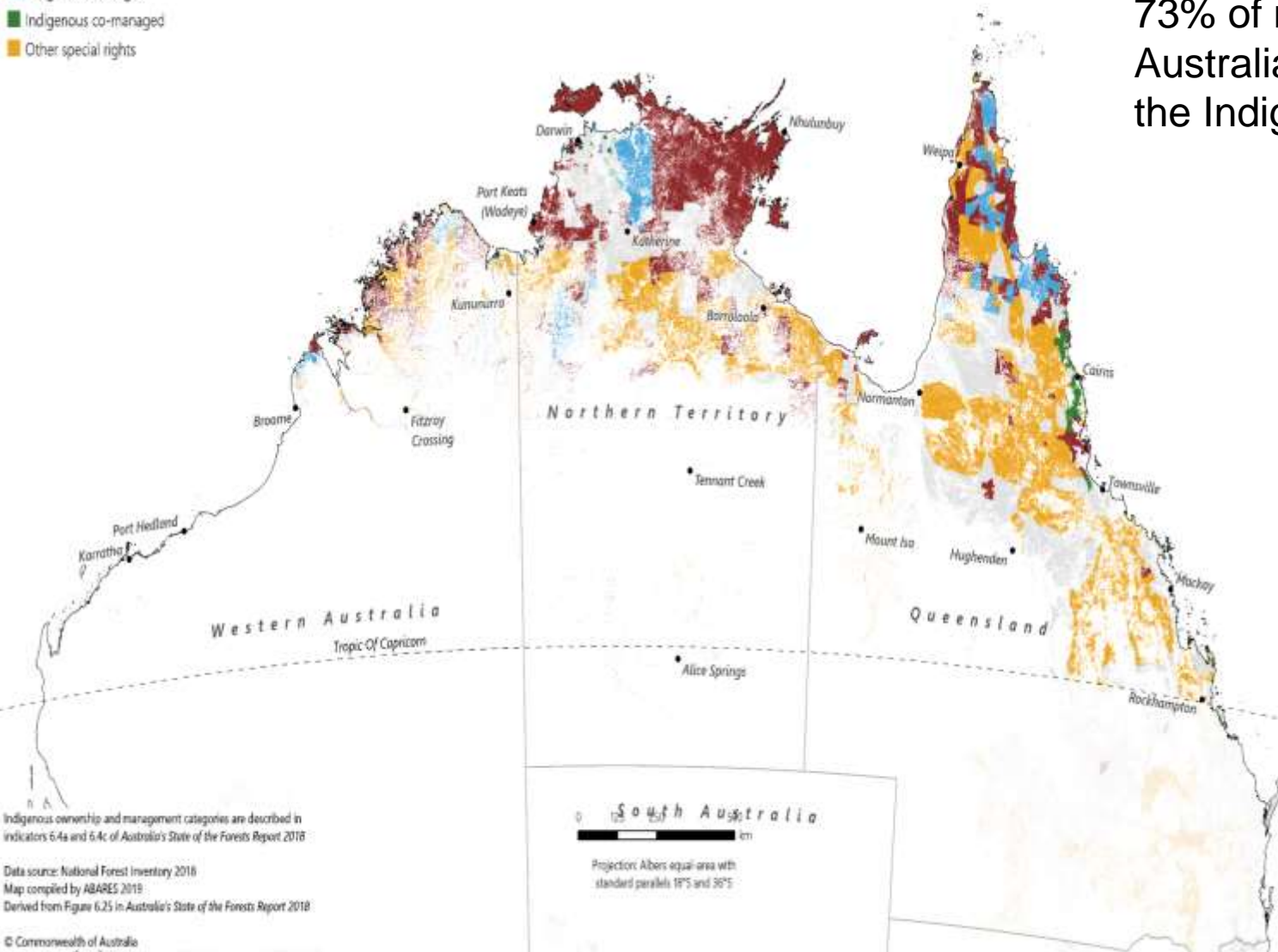
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■ All other forest

Indigenous ownership and management category

- Indigenous owned and managed
- Indigenous managed
- Indigenous co-managed
- Other special rights

73% of northern Australian forest is on the Indigenous estate



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Forests in northern Australia in the National Reserve System, by IUCN protected area category



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All other forest

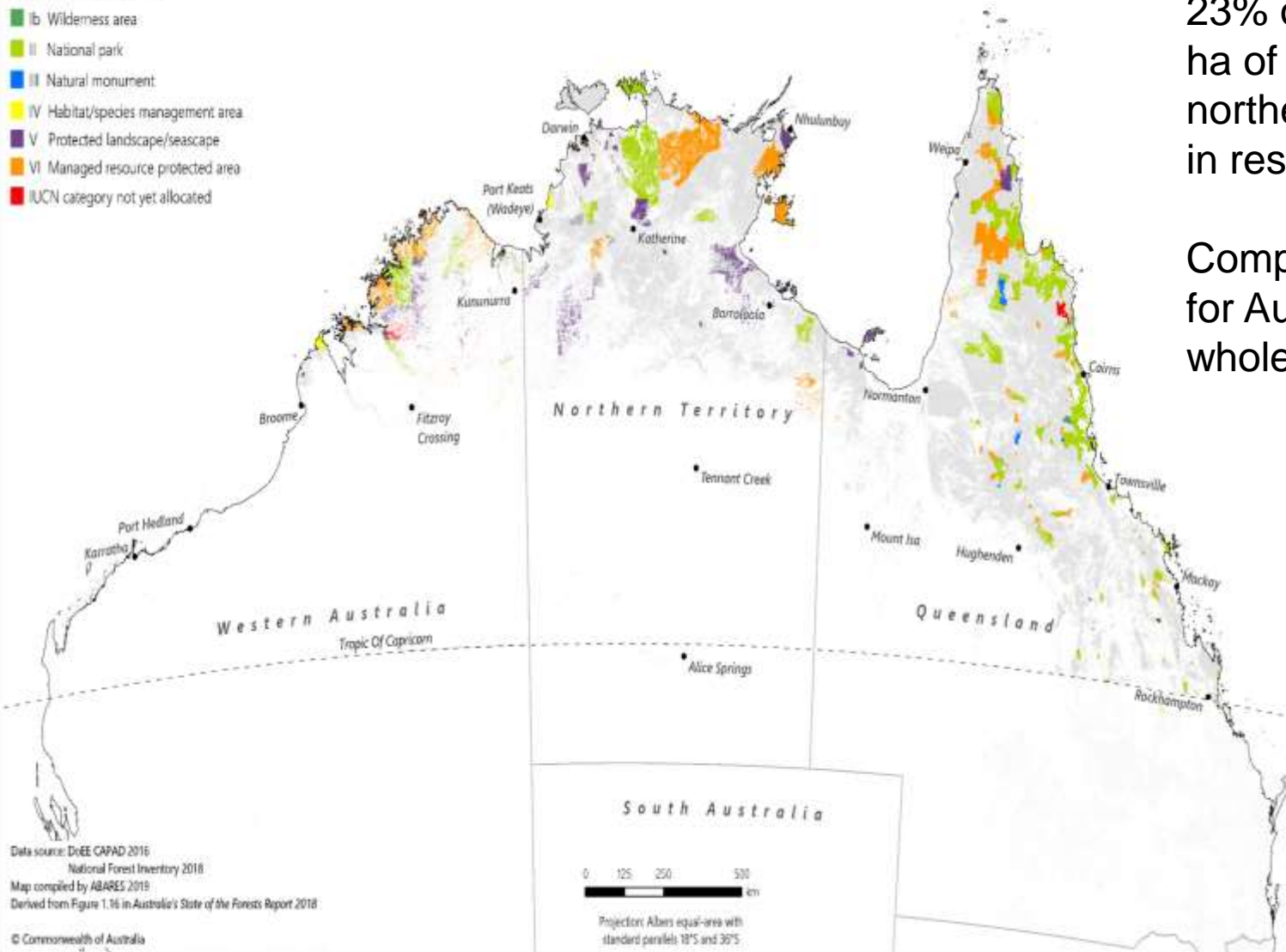
Forest in National Reserve System by IUCN category

- Ia Strict nature reserve
- Ib Wilderness area
- II National park
- III Natural monument
- IV Habitat/species management area
- V Protected landscape/seascape
- VI Managed resource protected area
- IUCN category not yet allocated

Forest reserves

23% of the 63 million
ha of forests in
northern Australia are
in reserves

Compared with 25%
for Australia as a
whole



Data source: DoEE CAPAD 2016
National Forest Inventory 2018
Map compiled by ABARES 2019
Derived from Figure 1.16 in Australia's State of the Forests Report 2018

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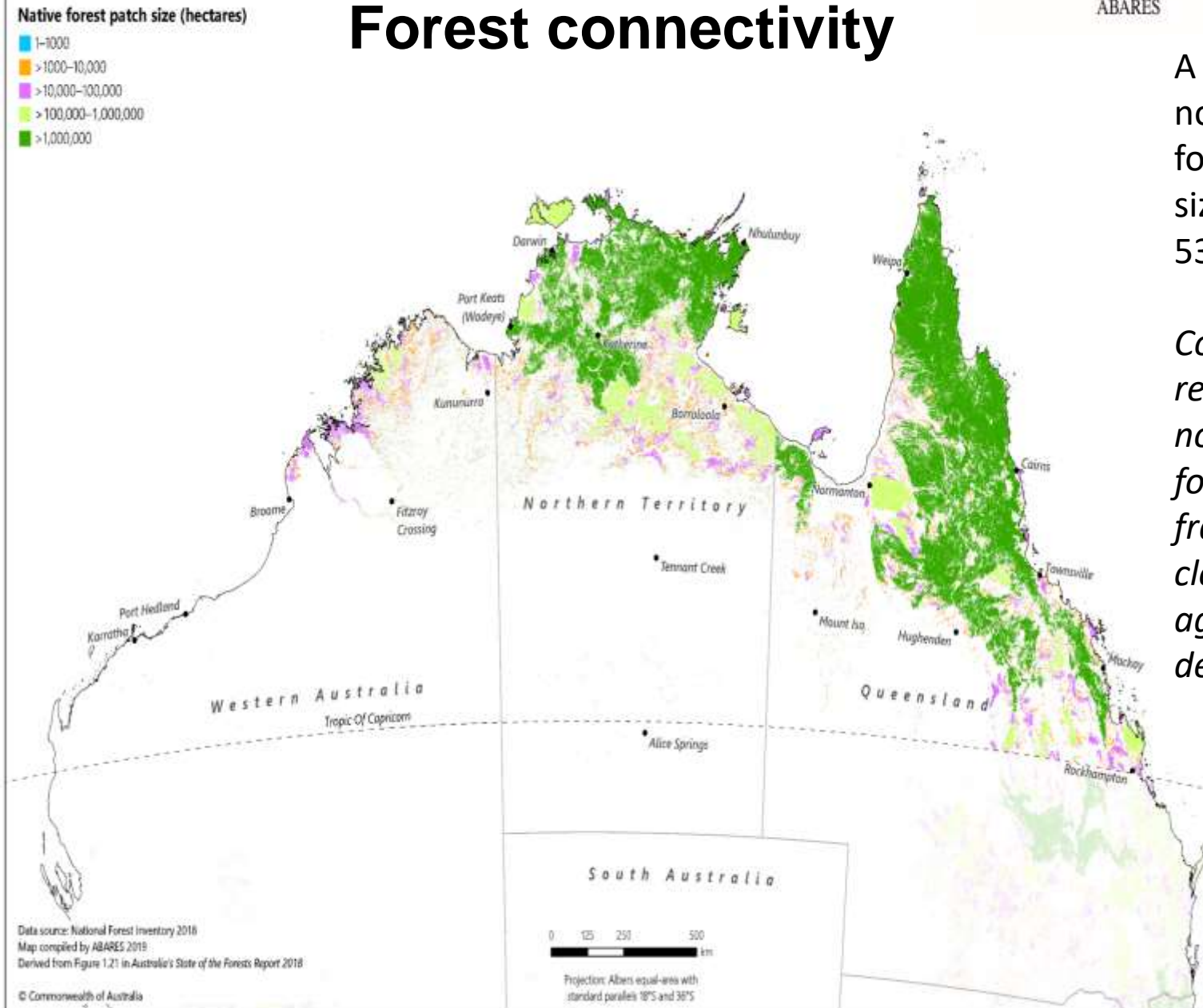
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Forest connectivity

A total of 64% of northern Australian forests are in patch sizes > 1 million ha (cf 53% Australia wide)

Compared with the rest of Australia, northern Australian forests are less fragmented by land clearing for agriculture or urban development



Native forest available and suitable for commercial wood production in northern Australia

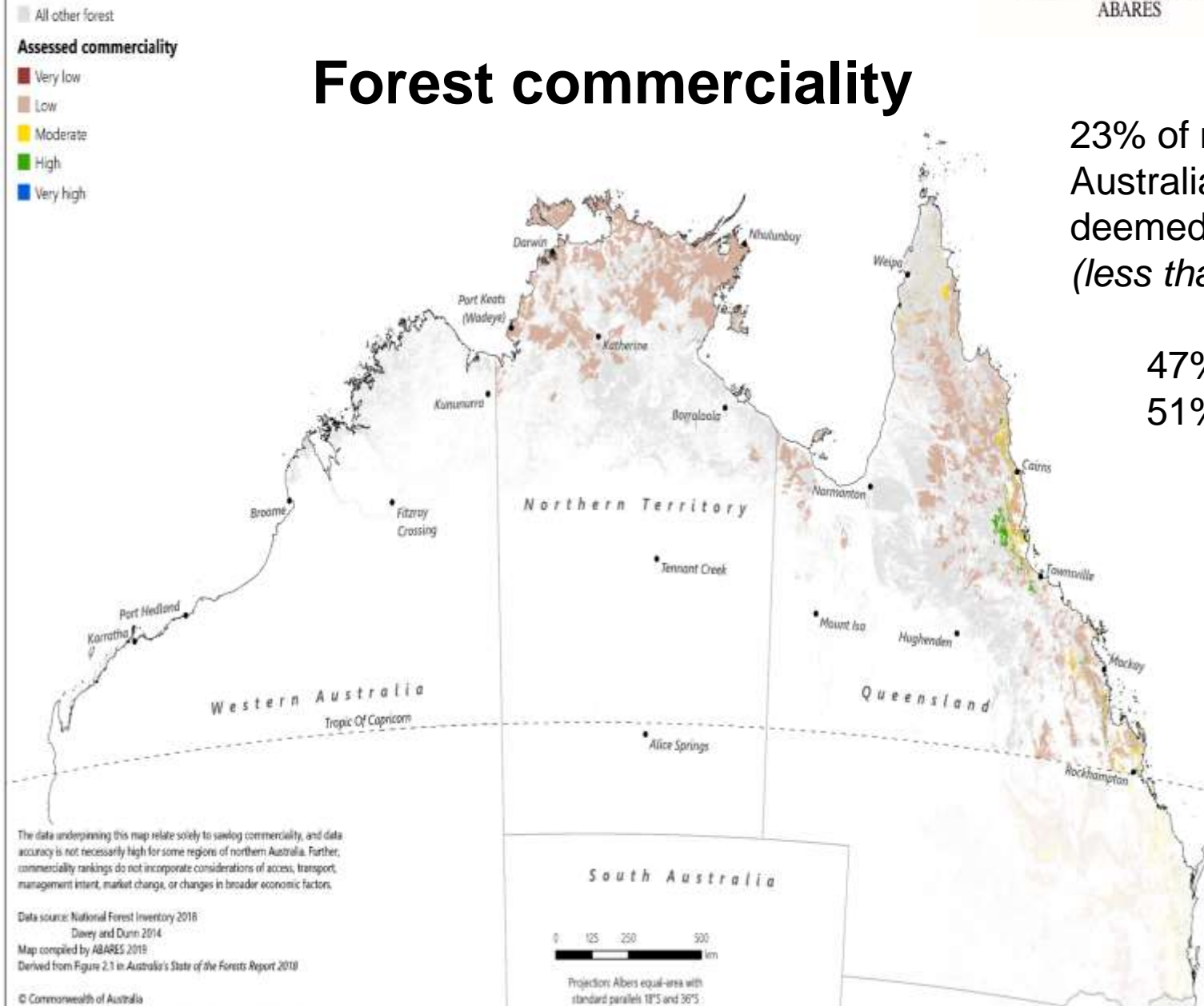


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Forest commerciality

23% of northern
Australian forests
deemed commercial
(less than Australia wide)

47% leasehold
51% private forest



Cape York

- **indigenous forestry development**

- **large areas** of commercial native forest on traditional lands (1.7 Mha) & bauxite leases (0.6 Mha)
- capacity building and infrastructure needs
- Wik: commercial sale agreement for domestic processing (DTM Timber)
- Cape York Timber: sawmill in Cooktown

- **Crown leasehold lands**

- hardwood resources on grazing land
- short term supply contracts to expire
- new crown volumes needed for industry
- cluster of hardwood mills in FNQ (e.g. Tablelands Hardwoods, Mareeba)



Rehabilitation of bauxite leases after harvest (Wik Timber)



Cape York Timber - Darwin stringybark

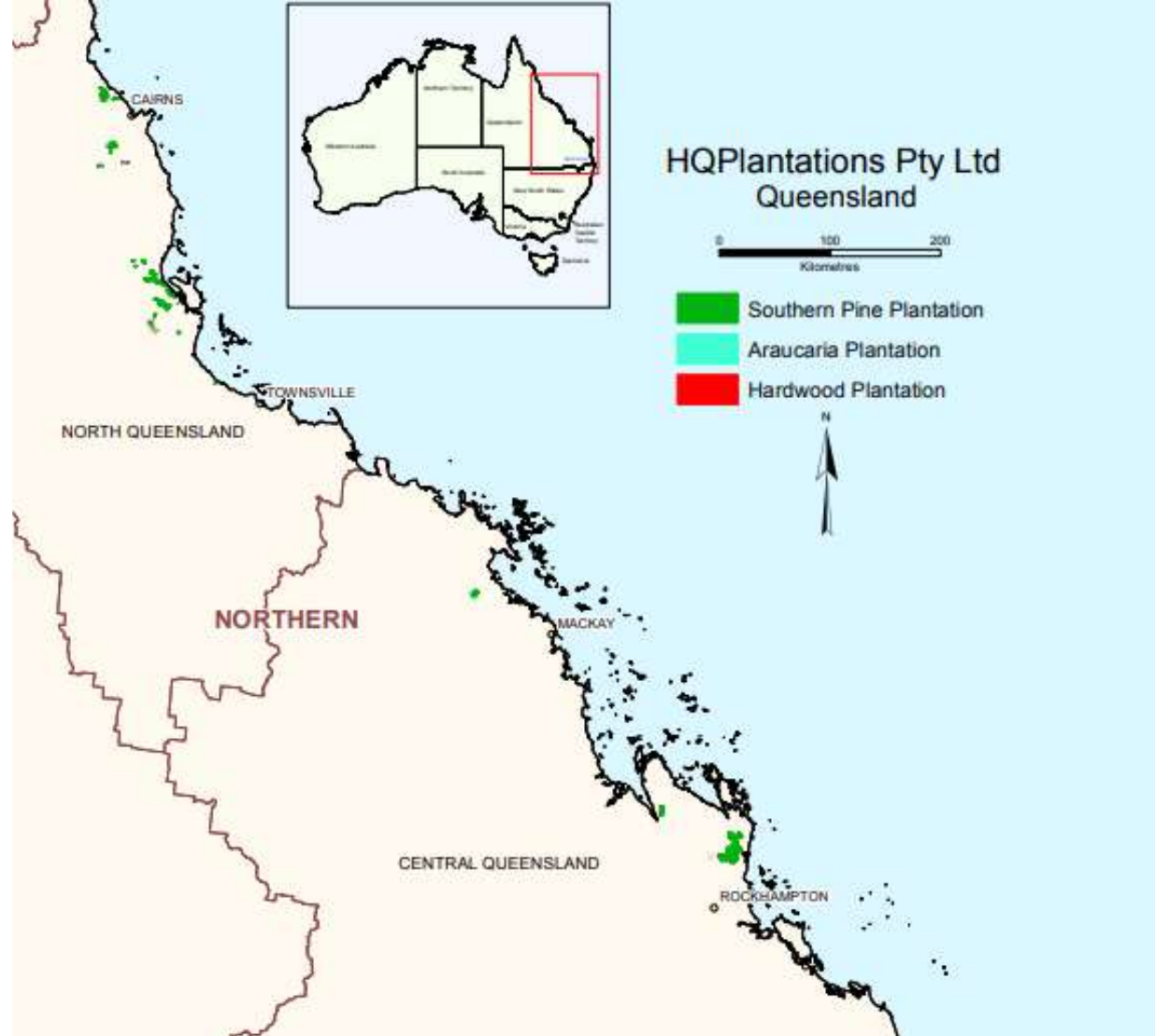


Far North

- **30,000 ha of softwood plantation (HQPlantations)**
 - hit by recent cyclones (Yasi 2011 & Marcia 2015)
- **softwood sawn timber mills with local timber supply chains into Cairns and broader region**
 - energy costs (scope for bioenergy)
 - pine resource expansion priority
- **other plantations (e.g. African Mahogany)**
 - silvopastoralism in Daly River region (NT)
 - potential for Queensland development
 - Townsville network of small growers



FNQ pine plantation resource







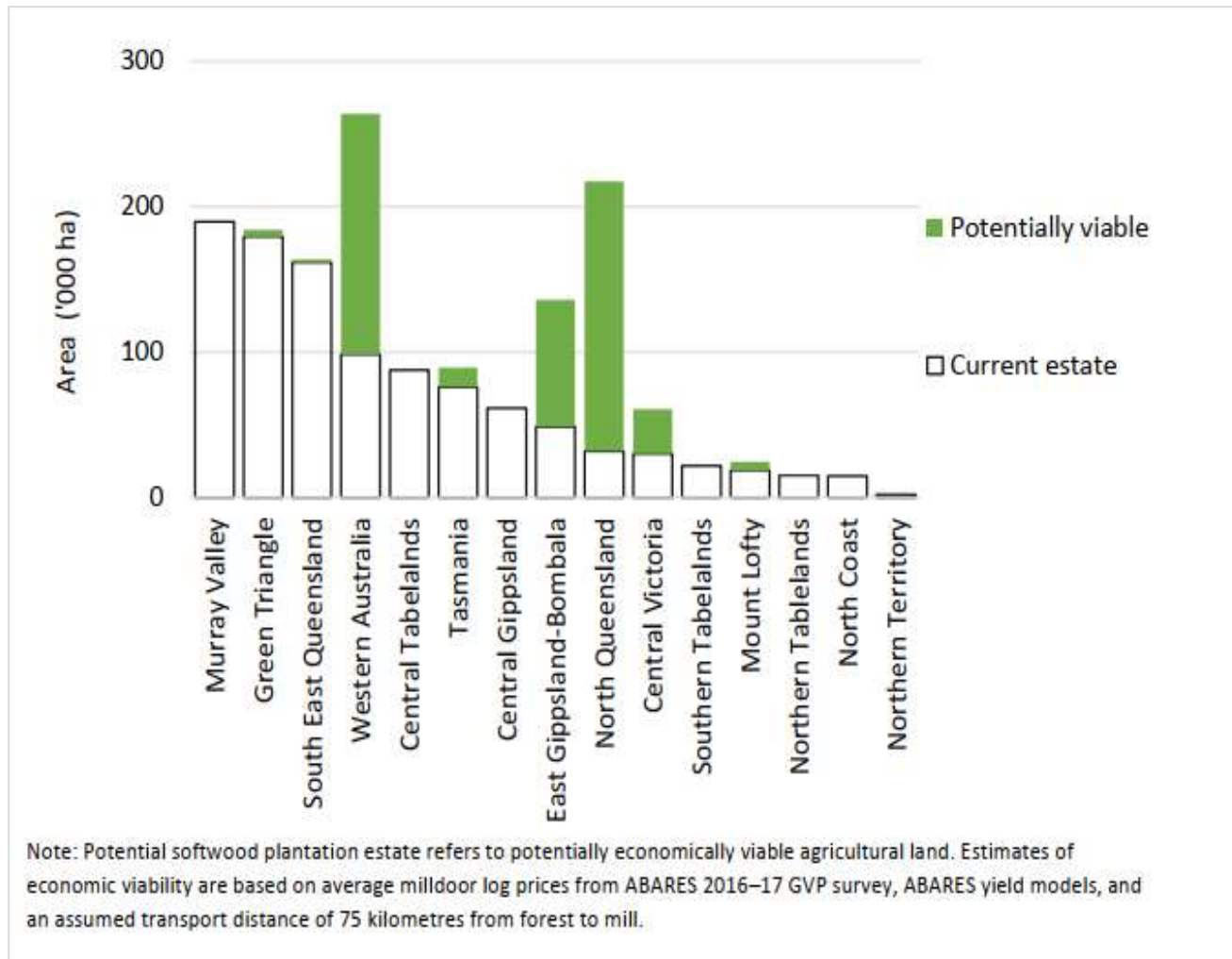
**CAIRNS
HARDWARE**

CONSIDER IT DONE

Truss & Frame
sector (examples)



New softwood sawlog plantation potential: FNQ



Source: Whittle and Downham 2019, ABARES.



Farm forestry: big opportunity



- farm income diversification
- NRM benefits
- increased wood supply
- agricultural benefits (e.g. stock shade & shelter)
- C savings

Next steps: where does the project go from here?

- Workshops in June & July
 - Cairns, Darwin, Nhulunbuy, Darwin, Karratha
- Ongoing feedback from and consultations with stakeholders regarding project overview
- Forum attendees will be sent a summary of findings from forums and asked to comment to ensure they have been correctly interpreted by the research team.
- September – Steering Committee to meet to discuss report and any necessary modifications



Stage 2

Socialisation of the Stage 1
Overview and preliminary
evaluation report



Next steps: where does the project go from here?



Stage 2

Socialisation of the Stage 1
Overview and preliminary
evaluation report

- September - submit Draft Stage 2 Report to CRCNA and continue to obtain feedback
- Mid October – submit fully socialised Draft Stage 2 report to CRCNA
- End October – issue alert highlighting key findings and progress



Next steps: where does the project go from here?



Stage 3

Final prioritisation of needs and opportunities for industry investment, research and development, and policy and strategic action to support forestry in northern Australia

- Early November – revise preliminary overview report to ensure all industry input is incorporated
- Seek formal industry acknowledgement of support for recommendations outlined in the report
- 15 November – final report due with CRCNA



How to provide feedback and consult with the project team

- Make sure you have provided us with your contact details to receive updates and draft reports
 - email address when RSVP? Sign in today?
 - Contact: clarissa@timberqueensland.com.au
- WHO ELSE IS HAPPY FOR THEIR CONTACTS TO BE PROVIDED?

