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# Woodlands for Wales indicators 2026

## Chapter 4: a competitive and sustainable forest sector

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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Woodlands for Wales indicators 2026  
Chapter 4: a competitive and sustainable forest sector

Statistical release number 47/2026.

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## Introduction

Chapter 4 of the Woodlands for Wales (WfW) strategy sets out the outcomes that relate to the forest industry in Wales. [The Welsh Government's Timber Industrial Strategy - Making Wood Work for Wales](#), which was published on 22 July 2026, further builds on the vision for a sustainable and competitive forest sector that supports the Welsh economy, especially in rural areas, and contributes to reducing Wales' carbon footprint through the increased use of timber in construction and reduced reliance on imported timber. The outcomes of the WfW strategy set out in this chapter and the associated indicators are laid out below.

### **Outcome 12: more timber is grown, processed and used in Wales**

Indicator 12a: timber production

Indicator 12b: timber availability forecasts

Additional data and context:

- Harvest/ availability ratios
- Wood use from imports and sourced within country

### **Outcome 13: the forest sector remains competitive and sustainable, supporting the Welsh economy**

Indicator 13a: gross value added of the forestry sector

Indicator 13b: business counts

### **Outcome 14: increased use of timber as a key renewable resource**

Indicator 14: wood use in construction - under development

Additional data and context: wood recycling

### **Outcome 15: a thriving, skilled workforce in the forest and woodland sector that can adapt to change**

Indicator 15a: employee numbers in the forest sector – under development

Indicator 15b: skills and sector capacity – under development

Additional data and context: accidents in the forest sector

## Trends

Trends have been calculated for the indicators using the criteria set out in table 1.

**Table 1: description of trend analysis for the Woodlands for Wales indicators**

Category	Symbol	Threshold
Improving	↑	>3% positive change since the last WfW indicators
Stable ( <i>i.e.</i> , little or no overall change)	=	≤3% change since the last WfW indicators
Deteriorating	↓	>3% negative change since the last WfW indicators
Not assessed due to insufficient comparable data	<b>N/A</b>	Not applicable

Where appropriate data are available, the most recent data point is compared with the value from the last WfW indicators report (or with data from that time period, if that indicator was not previously reported), smoothed using a 3-year average.

For example, a data point from 2025 would be compared to the 3-year average around 2018 (2017, 2018 and 2019). The purpose of this is to reduce the likely impact of individual annual anomalies.

The chapter 4 indicators and the associated trends since the last indicators report are shown in table 2.

**Table 2: trends for the Woodlands for Wales indicators**

Indicator	Trend since the last WfW indicators report
12a: Hardwood production	=
12a: Softwood production	=
12a: Total timber production	=
12b: Softwood availability forecast	↓
12b: Hardwood availability forecast	↓
13a: Gross Value Added of the forestry sector	↑
13b: Business counts in the forestry sector	↑
14: Wood use in construction	This indicator is under development so no trend can be reported.
15a: Employee numbers in the forest sector	This indicator is under development so no trend can be reported.
15b: Skills and sector capacity	This indicator is under development so no trend can be reported.

## Outcome 12: more timber is grown, processed and used in Wales

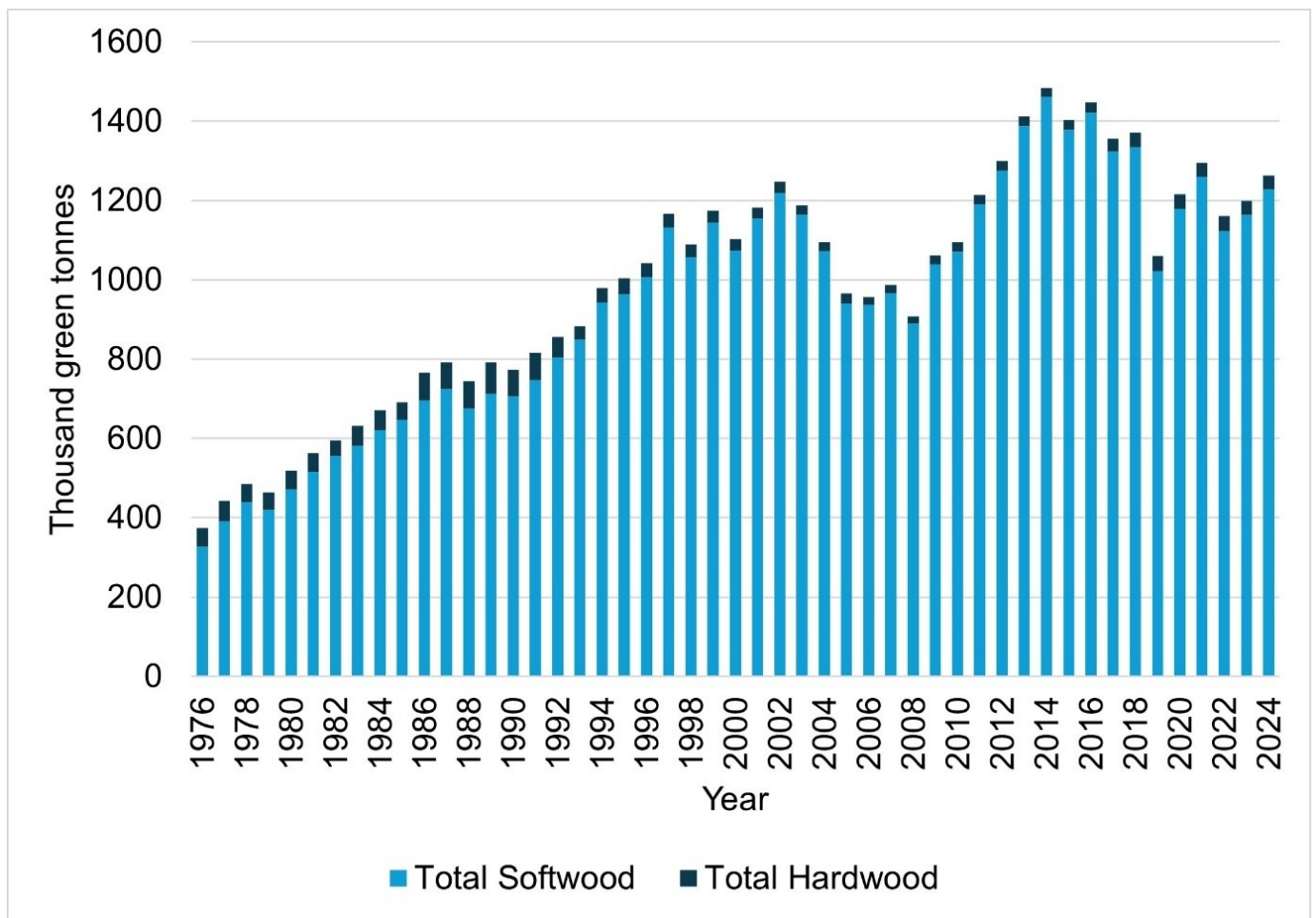
This outcome is addressed by 2 indicators: timber production and timber availability forecasts. Additional data about harvest/availability ratios, and imports, exports and apparent consumption is also included here.

### Indicator 12a: timber production

Indicator	Trend since the last WfW indicators report
Hardwood production	=
Softwood production	=
Total timber production	=

To ensure that more timber is grown, processed, and used in Wales, timber production within Wales must increase. Figure 1 shows timber production (also referred to as removals) in Wales between 1976 and 2024. This chart illustrates that softwood production far outweighs hardwood production in Wales, and that overall production has broadly increased over this period. Since the last WfW indicators report, there has been little to no overall change in production.

**Figure 1: timber production, Wales, 1976-2024**



Description of figure 1: Stacked bar chart showing total timber production, split by softwood and hardwood production. Softwood production represents most of the production. The overall trend displayed is an increase in timber production.

Source: [Forest Research - time series](#), 2025.

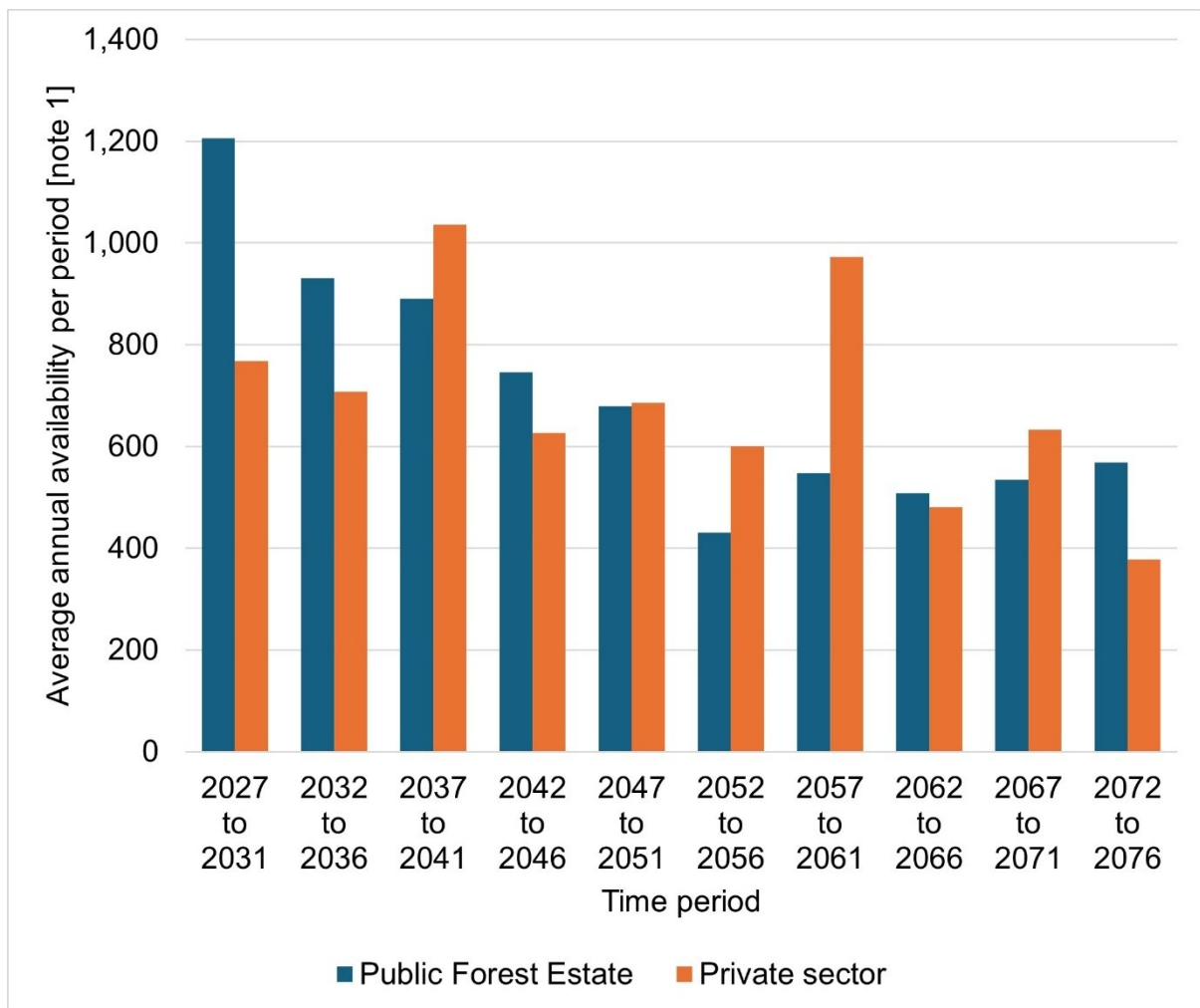
## Indicator 12b: timber availability forecasts

Indicator	Trend since the last WfW indicators report
Softwood availability forecast	↓
Hardwood availability forecast	↓

Timber production is reliant on past planting rates. The typical rotation (from establishment to felling) in the UK for the most commonly grown softwood species, Sitka spruce, is between 40 and 50 years. It is therefore important that timber availability into the future is considered. [Forest Research publishes softwood and hardwood timber availability forecasts](#). Results from the most recent 50-year timber availability forecasts are shown in Figure 2 and Figure 3. The availability of softwood in Wales, suitable for production, is expected to fall in the next 50 years. Hardwood availability is likely to increase in the next 25 years, before beginning to drop. These further highlights the need for increased planting rates across Wales to ensure that there will be enough homegrown timber to meet future needs.

It must be noted that the published timber availability forecasts are predictions which may be affected by any number of environmental, market, technological, social, and other factors.

**Figure 2: 50-year softwood availability forecast, Wales, 2027 to 2076**

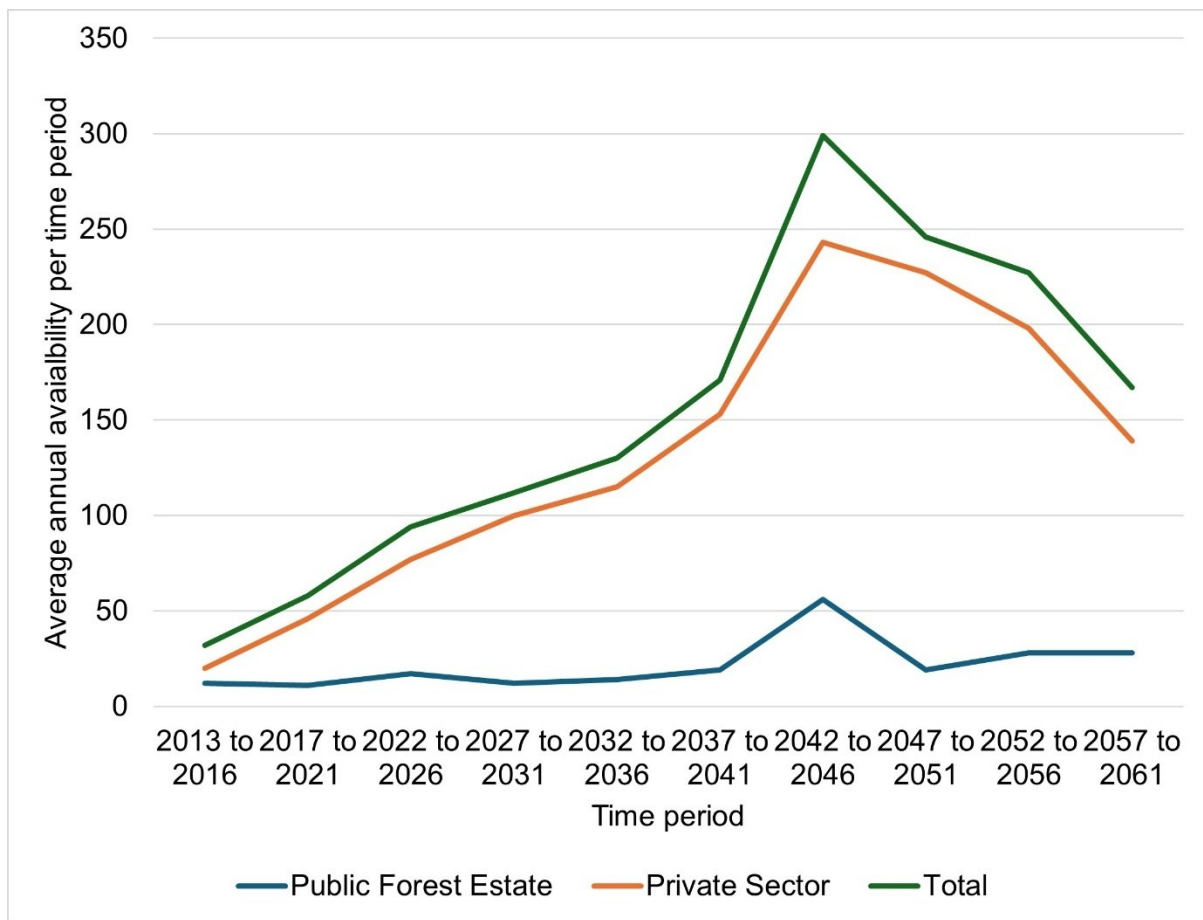


Description of figure 2: bar chart with 2 series, public forest estate and private sector. The overall trend is a decrease in availability of softwood timber.

Source: [Forest Research forecast of softwood availability, 2026](#).

[note 1] units are thousands of cubic metres overbark standing.

**Figure 3: 50-year hardwood availability forecast, Wales, 2013 to 2061**



Description of figure 3: a line chart showing 3 lines – public, private and total hardwood availability. Private availability is higher than public sector and is expected to increase between 2013 and 2046, before falling to 2061. Total availability follows a similar trend.

Source: [Forest Research forecast of hardwood availability, 2014.](#)

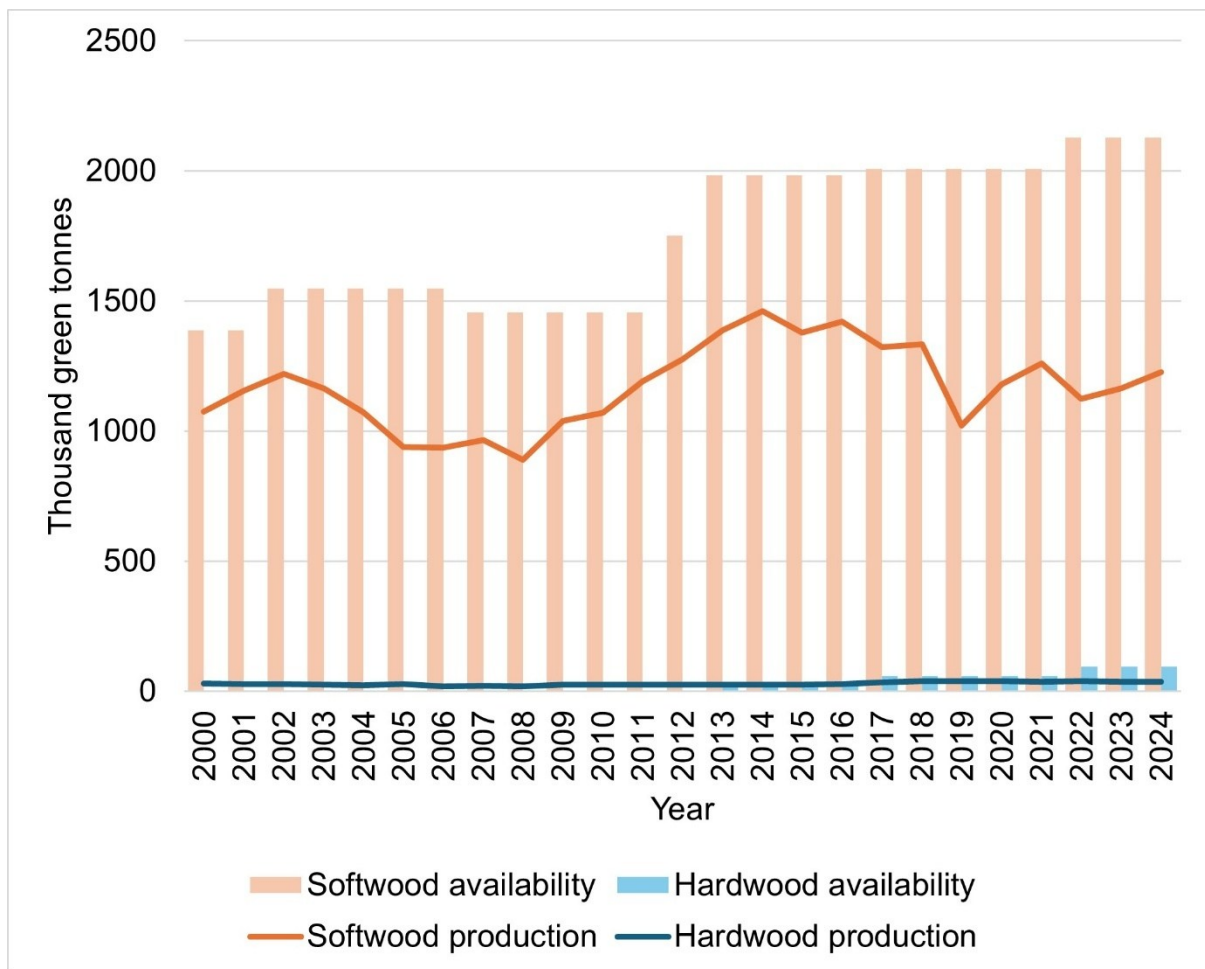
[note 1] units are thousands of cubic metres overbark standing.

## **Additional data and context**

### **Harvest/ availability ratios**

Figure 4 shows the amount of softwood and hardwood harvested (production) against the forecasted availability. Timber availability is an estimate, obtained from the aforementioned [availability forecasts](#). Table 3 shows the harvest/ availability ratios for the same data. This is the percentage of estimated available timber that is harvested each year. The recommended harvest range is 77% to 98% and, since 2012, softwood harvest ratios have fallen short of this recommendation. It should be noted that accurate hardwood availability forecasts are only available from 2013, so data are only included from this time.

**Figure 4: timber availability vs production, Wales, 2000-2024**



Description of figure 4: a combined bar and line chart. Bars show availability of soft and hard wood, lines show production. Availability and production show similar trends for hardwood and softwood. Softwood production and availability is far higher than hardwood production and availability.

Source: Forest Research, 2026.

**Table 3: harvest/ availability ratios**

<b>Year</b>	<b>Softwood (%)</b>	<b>Hardwood (%)</b>
1997	81.54%	
1998	76.21%	
1999	82.48%	
2000	77.43%	
2001	83.20%	
2002	78.80%	
2003	75.18%	
2004	69.30%	
2005	60.70%	
2006	60.57%	
2007	66.30%	
2008	61.02%	
2009	71.24%	
2010	73.51%	
2011	81.67%	
2012	72.77%	
2013	69.99%	75.00%
2014	73.63%	75.00%
2015	69.49%	78.13%
2016	71.66%	81.25%
2017	65.85%	56.90%
2018	66.40%	63.79%
2019	50.82%	67.24%
2020	58.69%	63.79%
2021	62.67%	62.07%
2022	52.77%	39.36%
2023	54.65%	38.30%
2024	57.66%	38.30%

Source: Forest Research, 2026.

## Imports, exports, and apparent consumption

A desired outcome of the strategy is that more home-grown timber is utilised. Currently much of the timber used in the UK comes from imports. Data for timber imports and exports are not available at a more granular level than the UK as a whole. This is due to challenges in separating the fate of Welsh timber from that of the UK. Included in Table 4 are the figures for the UK, not broken down by nation. Figure 5 shows the percentage of apparent consumption that comes from timber imports in the UK. As can be seen, this is falling. This is a positive trend as it is a desired outcome of the WfW strategy to utilise more home-grown timber. Further work is needed to determine what the trends are for Wales around both timber use from imports and home-grown timber.

**Table 4: production, imports, exports and apparent consumption, UK, 1994-2024**

Unit: Million cubic metres of Wood Raw Material Equivalent (WRME) underbark.

Year	UK production	Imports	Exports	Apparent consumption
1994	7.9	47.1	4.6	50.4
1995	8.1	43.6	5.2	46.5
1996	7.4	44.9	4.5	47.8
1997	7.8	47.5	5.5	49.8
1998	7.5	46.6	5.8	48.4
1999	7.7	45.6	6.0	47.3
2000	7.8	47.4	5.8	49.5
2001	7.9	49.4	5.9	51.4
2002	7.8	48.5	5.8	50.4
2003	8.1	49.0	7.1	50.0
2004	8.3	53.2	7.5	54.0
2005	8.5	51.2	5.8	54.0
2006	8.4	53.6	5.9	56.1
2007	9.0	54.5	6.8	56.7
2008	8.4	46.3	5.3	49.4
2009	8.6	39.5	4.2	44.0
2010	9.6	41.6	5.5	45.8

Year	UK production	Imports	Exports	Apparent consumption
2011	10.0	40.6	5.2	45.5
2012	10.1	39.6	6.5	43.2
2013	10.8	42.2	6.2	46.8
2014	11.2	47.0	4.8	53.4
2015	10.6	49.3	4.1	55.8
2016	10.8	49.6	3.8	56.5
2017	10.9	50.3	4.2	57.0
2018	11.2	49.1	3.9	56.4
2019	10.8	48.4	4.0	55.2
2020	10.5	48.0	3.6	54.8
2021	10.9	46.9	4.7	53.1
2022	9.8	43.1	4.5	48.3
2023	9.5	37.4	4.5	42.5
2024	10.1	42.5	4.0	48.5

Source: [Forestry Statistics: chapter 3 - Trade, Forest Research, 2025.](#)

**Figure 5: percentage of apparent timber consumption from imports, UK, 1994-2024**



Description of figure 5: a line chart showing a single trend line. Percentage of apparent UK timber consumption from imports has fallen overall since 1994, but remains high at approximately 88%.

Source: [Forestry Statistics: chapter 3 - Trade, Forest Research, 2025.](#)

## Outcome 13: the forest sector remains competitive and sustainable, supporting the Welsh economy

This outcome is assessed by 2 indicators: gross value added (GVA) of the forestry sector and business counts.

### Indicator 13a: gross value added of the forestry sector

Indicator	Trend since the last WfW indicators report
Gross Value Added of the forestry sector	↑

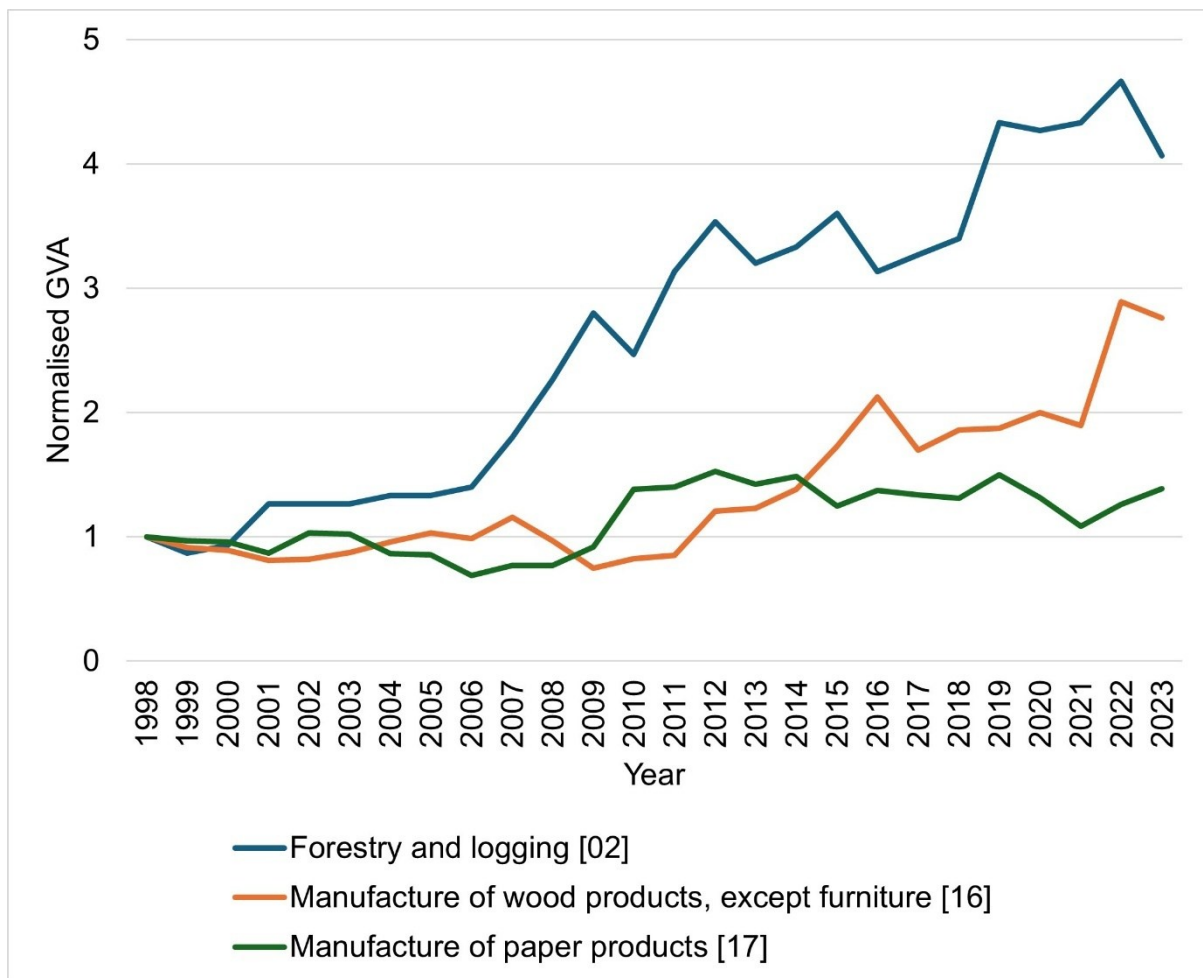
Gross value added (GVA) is a measure of the contribution of each individual producer, industry, or sector, to the economy. It is the difference between the value of outputs and the value of intermediate consumption, so mainly comprises employment costs and profits. This is therefore a useful measure of the contribution of the forest sector to the Welsh economy.

The annual business survey (ABS) carried out by the Office for National Statistics (ONS) includes statistics on gross value added for different industries, classified using the [UK Standard Industrial Classification \(SIC 2007\)](#). The 3 most relevant SIC codes included in these data are SIC 02: forestry and logging, SIC 16: manufacture of wood products, except furniture, and SIC 17: manufacture of paper products. It should be noted that forest nurseries are included in SIC 02, however some tree nurseries are included in SIC 01.30: plant propagation. It should be noted that not all businesses operating within the forest sector will be captured by these SIC codes. For example, recreation and tourism associated with woodlands are not accounted for here, although the value of this is addressed in chapter 1, outcome 4.

Figure 6 shows the GVA of different parts of the forestry sector in Wales normalised with 1998 as the base year. As can be seen GVA has increased across this period, with the largest growth seen in the forestry and logging sector. Since the last WfW indicators report, the trend in GVA across industry classifications is increasing.

Figure 7 shows normalised GVA of Wales compared to the UK. This suggests that the GVA increase in Wales has followed a similar trend to that of the UK as a whole.

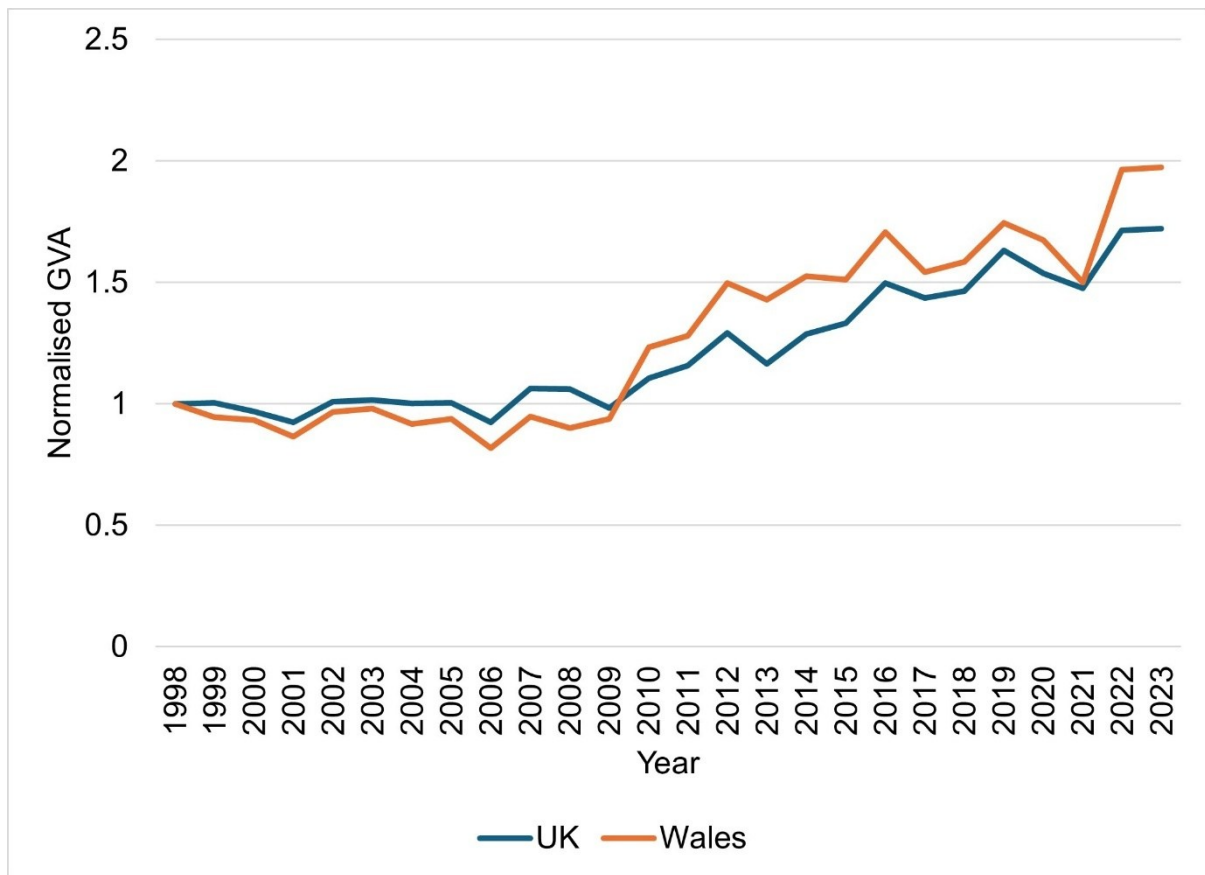
**Figure 6: Gross Value Added by the forest sector in Wales (1998 = 1.0)**



Description of figure 6: a line chart showing 3 trend lines for GVA in the forest sector, one each for the 3 SIC categories of interest. All 3 show an increase over the time period (1998-2023).

Source: [Regional gross value added \(balanced\) by industry: all ITL regions - Office for National Statistics, 2026.](#)

**Figure 7: Gross Value Added by the forest sector in Wales compared to the UK (1998 = 1.0)**



Description of figure 7: a line chart showing 2 normalised trend lines for GVA of the forest sector for the UK and Wales. The lines follow a similar trend of increase between 1998 and 2023.

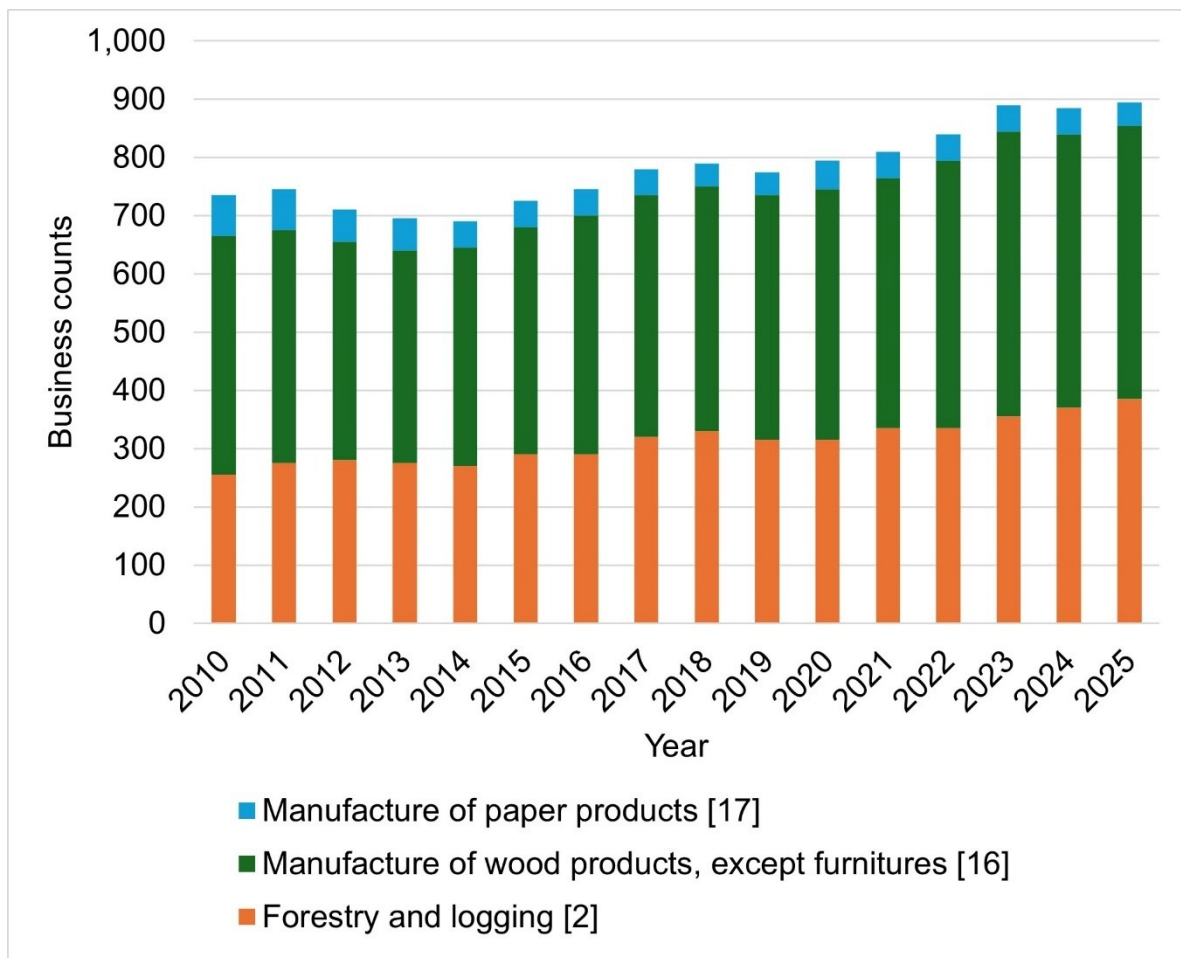
Source: [Regional gross value added \(balanced\) by industry: all ITL regions - Office for National Statistics, 2026.](#)

## Indicator 13b: business counts in the forestry sector

Indicator	Trend since the last WfW indicators report
Business counts in the forestry sector	↑

Figure 8 shows business counts in Wales by SIC category. The total number of businesses operating in the timber and forestry industries has increased since 2010, this is dominated by an increase in the number of businesses in the forestry and logging industry (SIC 02). There has been a decline in the number of businesses operating in the manufacture of paper and paper products. Since the last WfW indicators report, the number of businesses operating in the sector as a whole has increased.

**Figure 8: business counts by industry, Wales, 2010-2024**



Description of figure 8: a stacked bar chart showing business counts with bars split into the 3 SIC categories of interest. Overall business counts have increased over the time period. Manufacture of wood products (SIC 16) represents the largest proportion of businesses.

Source: [UK Business counts, Office for National Statistics, from Nomis on 26 April 2026.](#)

## **Outcome 14: increased use of timber as a key renewable resource**

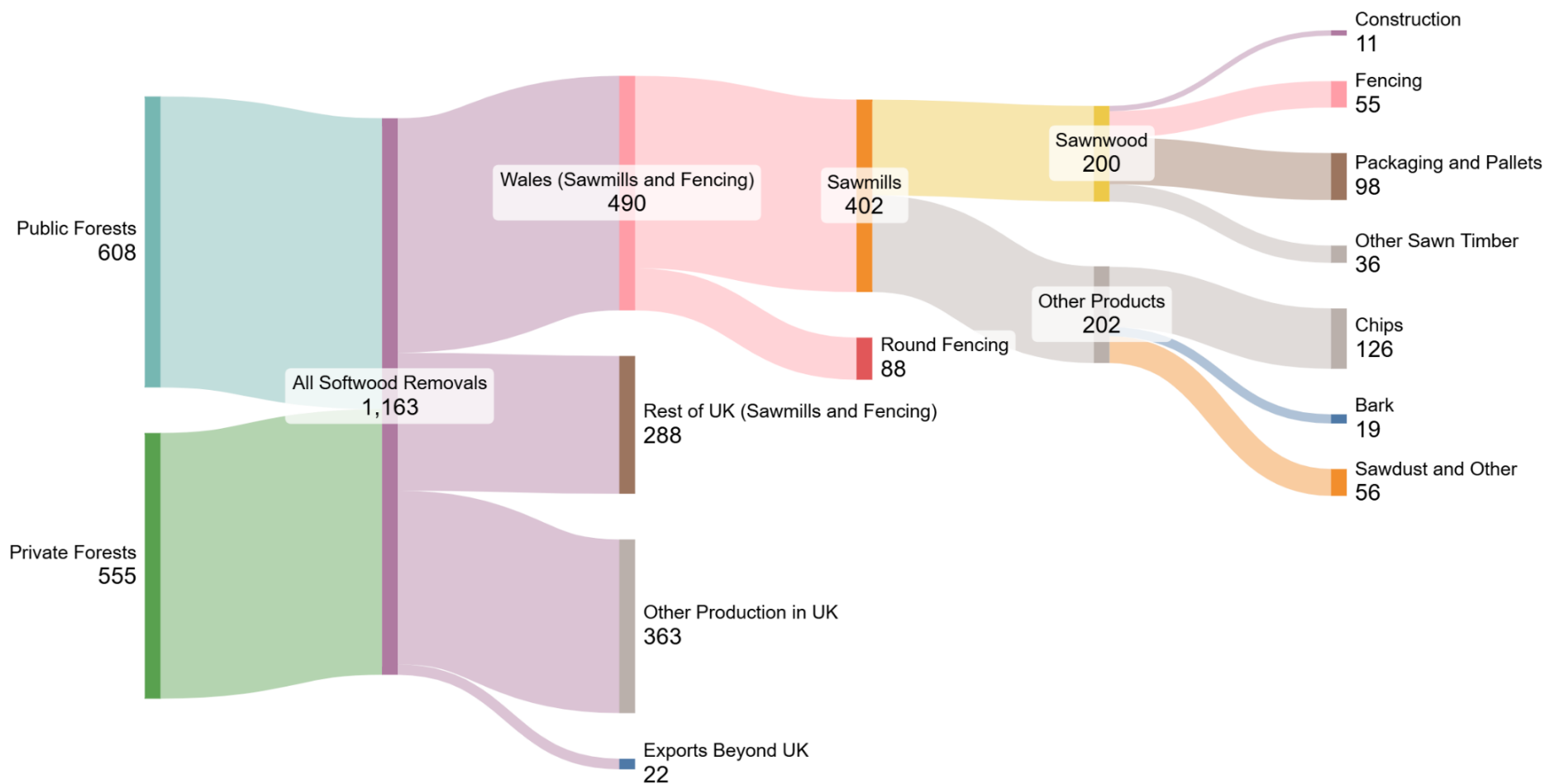
This outcome is assessed by one indicator: wood use in construction (under development). Some additional data about wood recycling are also included.

### **Indicator 14: wood use in construction - under development**

Trend since the last WfW indicators report: this indicator is under development, so no trend is reported here.

The use of wood in long-lasting products such as in construction or furniture ensures that carbon stored while the timber was growing is retained long-term. There is a need for increased use of timber in construction in Wales, as highlighted in the [Timber Industrial Strategy: making wood work for Wales](#). This indicator is listed as under development as a clear, replicable and reliable source of data around the amount of Welsh timber utilised in Wales is hard to obtain. Figure 9 shows an estimation of the flow of Welsh timber in 2023, produced by FR. Only a small proportion of Welsh grown timber goes directly to structural timber for construction within Wales (11 thousand green tonnes, or 0.94% of all softwood removals). However, it is likely that other timber products used in construction, such as medium density fibreboard (MDF), particle board (chipboard), or oriented strand board (OSB), are produced in Wales from Welsh timber or recycled timber.

**Figure 9: sankey diagram summarising the flow of timber produced in Wales, 2023**



Description of figure 9: A Sankey chart showing the flow of timber in Wales. Inputs are split into public and private forests (total removals). The diagram highlights the small proportion (< 1%) of removals going directly into construction.

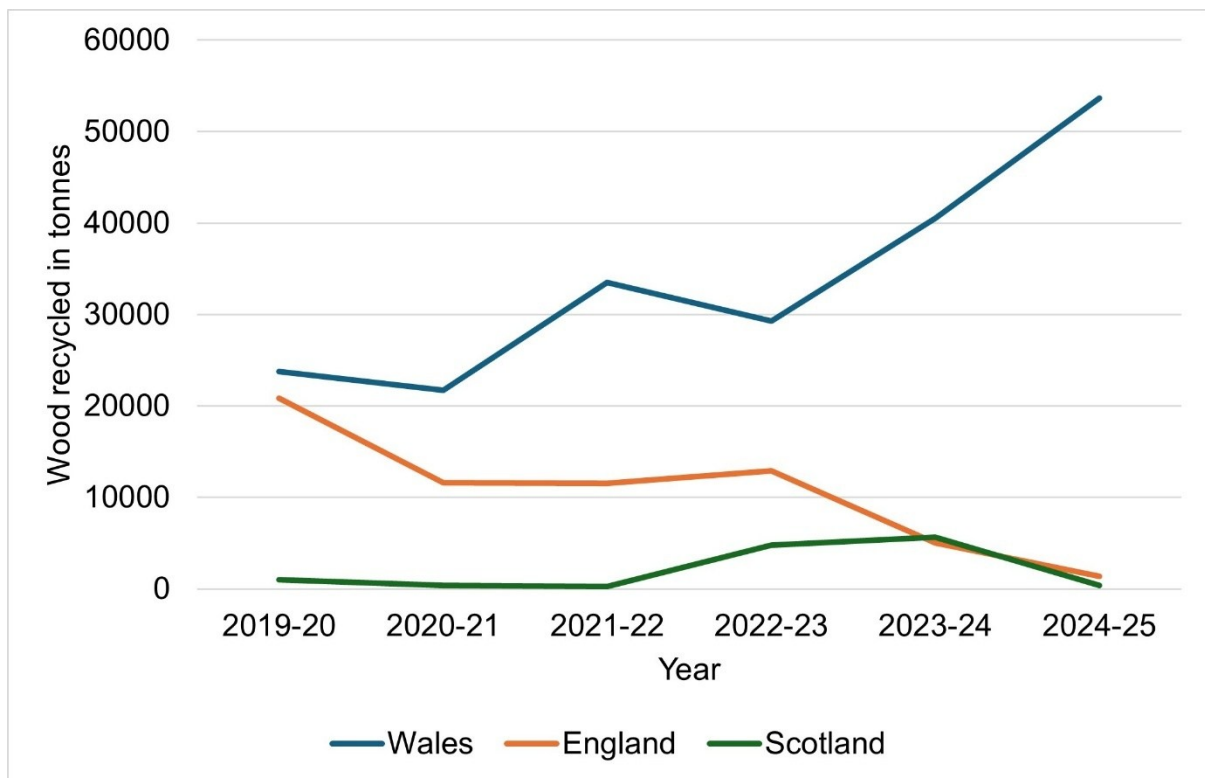
Source: Forest Research, 2025. Units: thousand green tonnes.

## **Additional data and context**

### **Wood recycling**

Waste wood can be recycled into valuable new products, often of higher value than the original product. This can include panel boards, biomass, animal bedding, landscaping surfaces, and more. Recycling is one important aspect of the drive towards a more sustainable and circular timber industry in Wales. Figure 10 shows the volumes of wood recycled across the UK. Wales recycles more wood than the other GB nations. However, additional validation undertaken by NRW has identified that the proportion of wood reported as recycled or reused is likely to have been overstated in recent years. Users can continue to refer to the overall recycling trends and compare across years but should note that the headline recycling rate is likely to be lower than published. Over 65% of wood recycling in Wales takes place at Kronospan Ltd, Chirk, where a total of 35,213 tonnes of wood was recycled in the financial year 2024 to 25.

**Figure 10: wood recycling UK, by nation, 2019-2025**



Description of figure 10: a line chart with 3 lines representing wood recycling in tonnes in Wales, England and Scotland. Wales has higher recycling than the other nations, and this is increasing.

Source: [Recycling data for Wood | My Recycling Wales](#)

## **Outcome 15: a thriving, skilled workforce in the forest and woodland sector that can adapt to change**

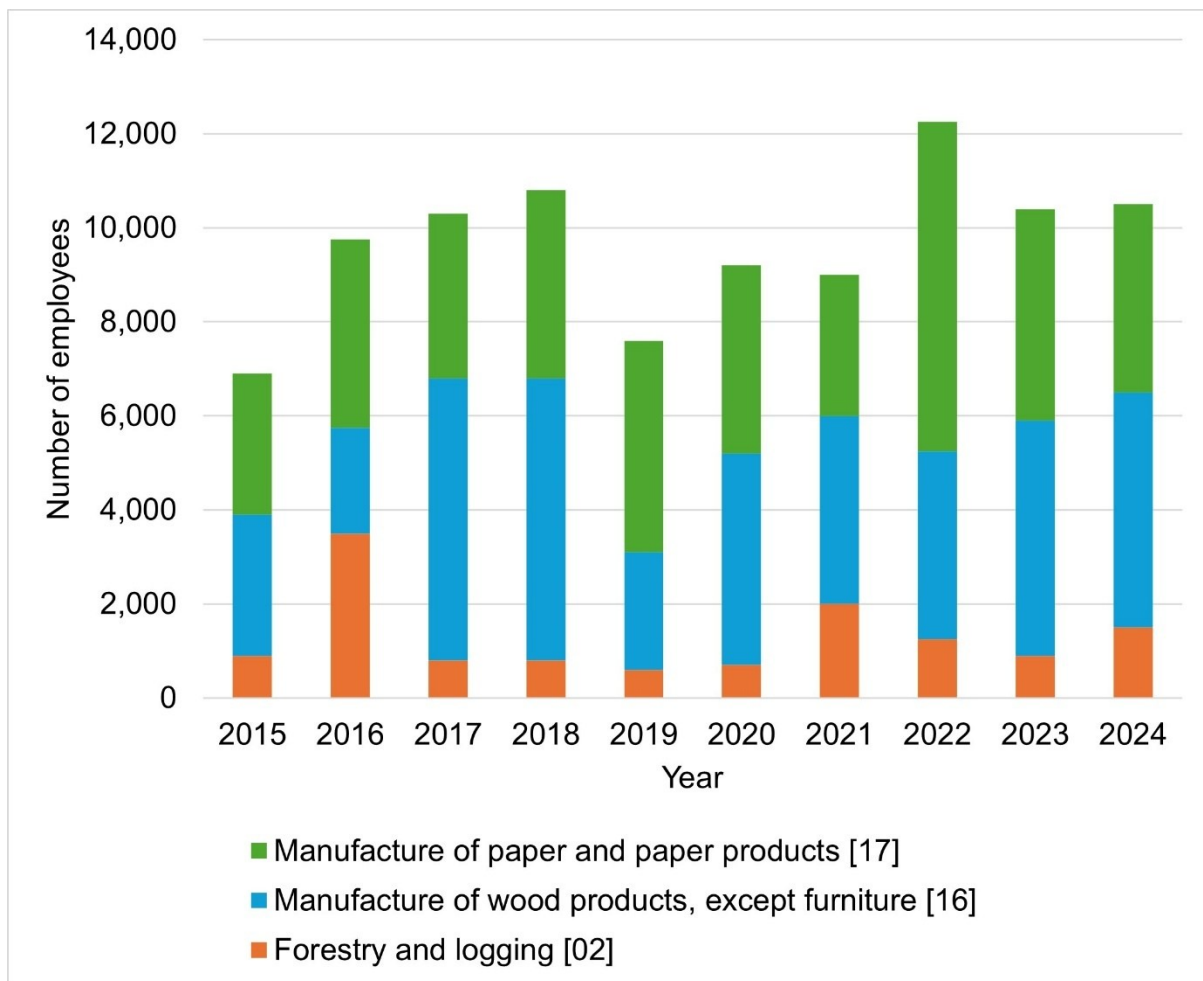
This outcome is assessed by 2 indicators: Employee numbers in the forest sector and skills and sector capacity (under development). Additional data about accidents in the forest sector is also included here.

### **Indicator 15a: employee numbers in the forest sector – under development**

Trend since the last WfW indicators report: this indicator is under development, so no trend is reported here.

Figure 11 shows employee numbers in the forest sector, by Standard Industrial Classification (SIC) category, taken from the Business Register and Employment Survey (BRES, ONS). Paper and wood production are shown to have higher levels of employment within the forest sector than forestry and logging. All publicly available BRES data are rounded to ensure anonymity. There are quite large discrepancies in the numbers shown for Wales, for example there are variations in employment in forestry and logging in 2016 and 2021, and in the numbers of employees in paper and paper product manufacturing in 2017 and 2018, all of which are unexplained. These irregularities can perhaps be attributed to the small number of employees throughout Wales, and detail lost due to rounding. Due to these data discrepancies this indicator is currently under development. It should also be noted that not all employment in the forestry sector is captured under these SIC codes, and some woodland related enterprises and employment may not be captured.

**Figure 11: employees in the forest sector by industry, Wales, 2015-2024**



Description of figure 11: a stacked bar chart showing number of employees across the forest sector. Bars are split by SIC code. No clear trends can be derived. Forestry and logging consistently accounts for less employment than the other 2 categories considered (manufacture of wood products and manufacture of paper products).

Source: [Business Register and Employment Survey \(BRES\), ONS, from Nomis on 26 April 2026.](#)

## Indicator 15b: skills and sector capacity – under development

Trend since the last WfW indicators report: this indicator is under development, so no trend is reported here.

Some data are included here to give a picture of skills and labour demand in Wales, however this indicator is listed as 'under development' as these data sources are one off reports and therefore do not constitute a replicable indicator for this outcome. It is hoped that following actions from the Timber Industrial Strategy, and other Welsh Government initiatives, clearer data around skills, education and attainment in the forestry sector will be available in the future.

In 2021, the Forestry Skills Forum released its final report on [Forestry Workforce Research](#). As part of this research, the projected labour demand in the timber industry was explored. Table 5 shows the breakdown of projected labour demand in the forestry sector, separated by sub-sector; Harvesting, Restocking and New Woodland Creation, and by role; Forest Operative, Forestry Supervisor and Professional Forester. These titles are taken from the Institute of Apprenticeships & Technical Education Occupational Maps [Institute of Apprenticeships and Technical Education](#) and have been adopted for the development of technical education in England. The same terms are utilised in the Welsh data to allow for comparison; however, it can be hard to distinguish between Forestry Supervisor and Professional Forester. The study by the Forestry Skills Forum highlights an expected overall increase in demand for forestry professionals in Wales until 2030.

**Table 5: project labour demand in the forest sector, Wales, 2019-2030**

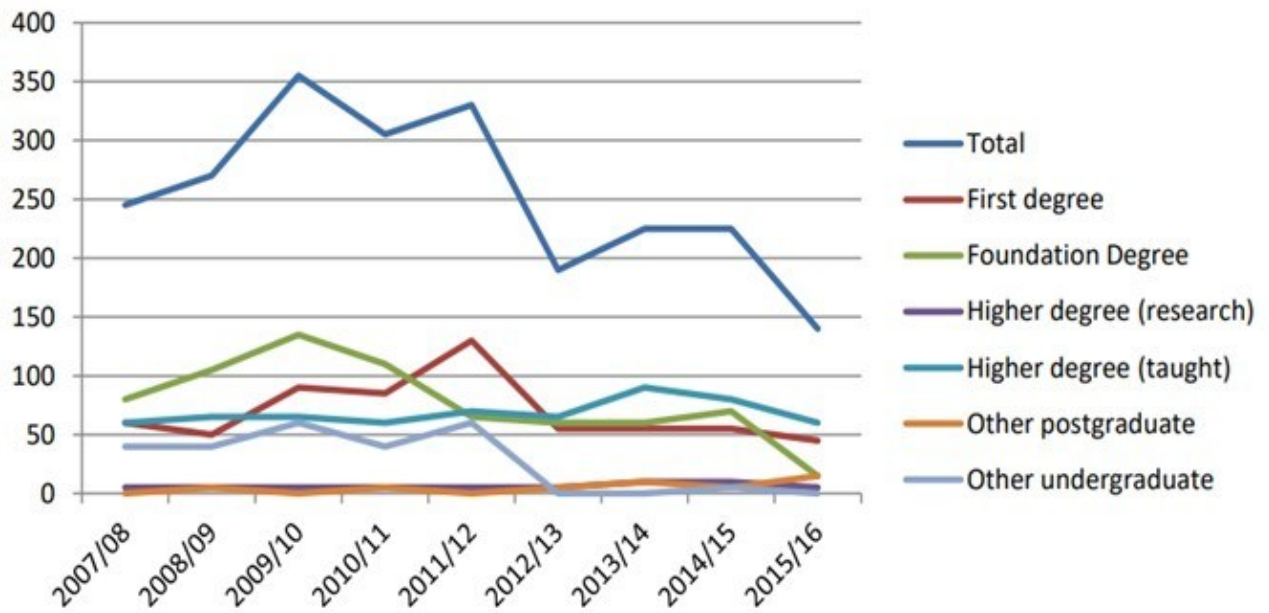
Sub-sector	Role	2019	2025	2030	% +/- to 2025	% +/- to 2030
Harvesting	Forest Operative	224	225	180	0	-19
Harvesting	Forestry Supervisor	26	26	21	0	-19
Harvesting	Professional Forester	13	13	10	0	-19
Harvesting	Total	262	263	211	0	-19

Sub-sector	Role	2019	2025	2030	% +/- to 2025	% +/- to 2030
Restocking	Forest Operative	47	47	38	0	-19
Restocking	Forestry Supervisor	7	7	6	0	-19
Restocking	Professional Forester	3	3	2	0	-19
Restocking	Total	57	57	46	0	-19
New Woodland Creation	Forest Operative	3	159	159	n/a	n/a
New Woodland Creation	Forestry Supervisor	0	24	24	n/a	n/a
New Woodland Creation	Professional Forester	0	20	20	n/a	n/a
New Woodland Creation	Total	3	203	203	n/a	n/a
Total	Forest Operative	273	431	377	58	38
Total	Forestry Supervisor	33	57	50	72	52
Total	Professional Forester	16	36	32	125	105
Total	Total	322	523	460	62	43

Source: [Forestry Skills Forum, 2021](#).

In 2017, the Forestry Skills Forum released [a forestry skills study for England and Wales](#). This report does not separate data for Wales specifically. Figure 12 shows the number of students across England and Wales by type of degree and academic year in forestry and arboriculture disciplines. The total number of students fell in the period between 2007/08 and 2015/16.

**Figure 12: higher education forestry and arboriculture students by type of degree and academic year, England and Wales, 2007-2016**



Description of figure 12: a line chart with multiple lines representing different degree types in forestry and agriculture. The trend for total education is that it has fallen since 2008/09.

Source: [Forestry Skills Forum, 2017.](#)

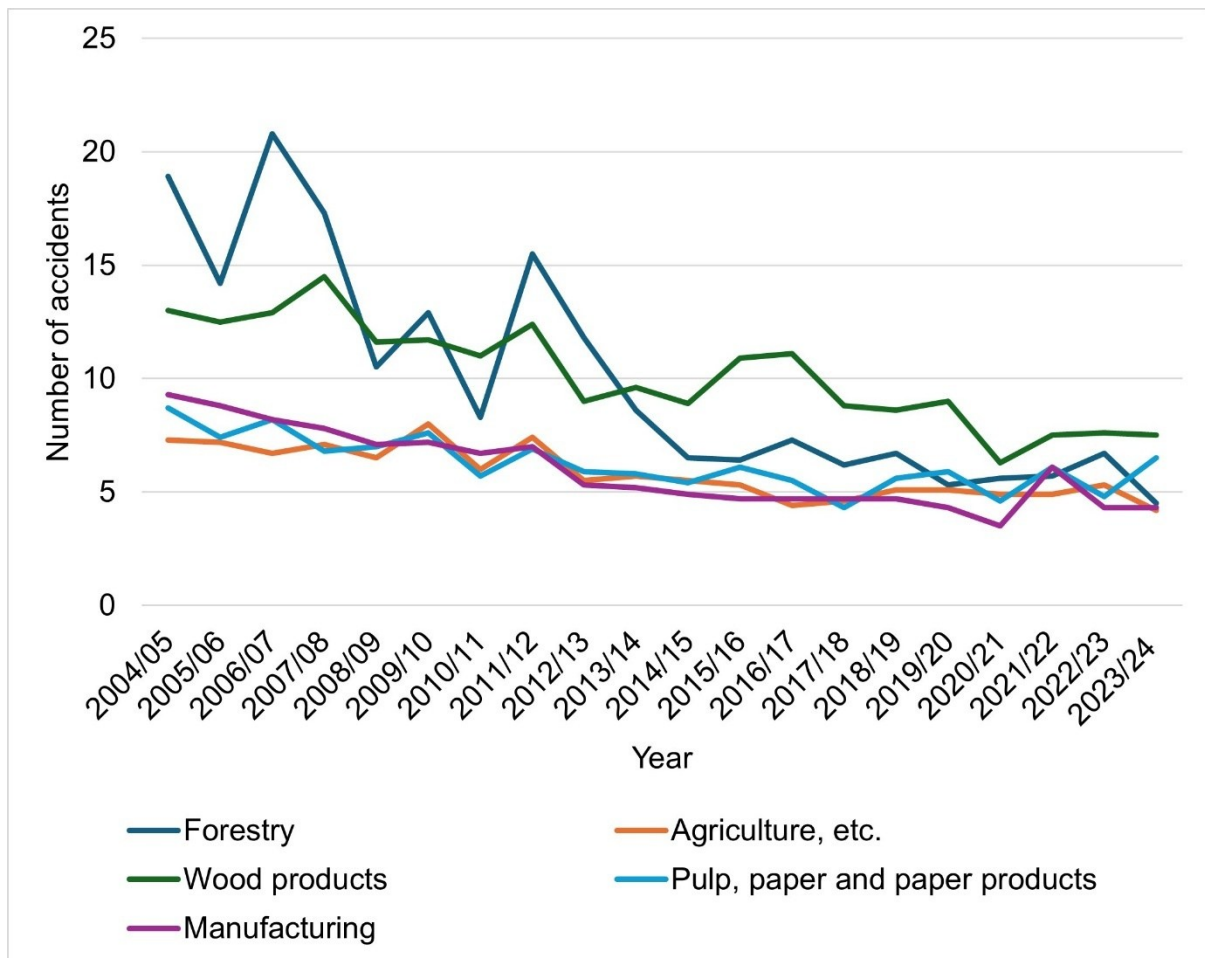
## **Additional data and context**

### **Accidents in the forest sector**

A thriving workforce is a safe workforce. It is therefore important that the number of accidents within the timber and forestry industries are declining. Figure 13 shows the total report accidents per 1,000 employees by industry between 2004 and 2023.

These data are for Great Britain, and taken from Forestry Statistics 2025, produced by Forest Research. The total number of reported accidents has fallen in all included industries over the time period shown.

**Figure 13: number of total reported accidents per 1,000 employees, by industry, Great Britain, 2004/05 to 2023/24 [note 1]**



Description of figure 13: a line chart showing 5 trend lines for the number of accidents per 1000 employees for different industries (forestry, wood product, manufacturing, agriculture and paper). All trend lines are declining.

Source: [Forestry Statistics, Forest Research, 2025.](#)

[note 1] 2022/23 revised figure, 2023/24 provisional figure.