FEARANN COIMHEARSNACHD NA H-ALBA | COMMUNITY LAND SCOTLAND

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Community Land Scotland Discussion Papers

Community Land Scotland supports the need for radical land reform and has in recent years published occasional Discussion papers which can contribute to understanding, provoke and encourage discussion on issues relevant to the land question in Scotland. The research undertaken for any of these papers and any statements and views expressed in them as a result are the sole responsibility of the authors. Community Land Scotland is not obliged to publish any contributions it receives or responses to the papers it publishes.

Foreword by Dr Josh Doble, Director of Policy and Advocacy at Community Land Scotland

We are publishing a series of papers focused on drivers behind the industrial forestry sector in Scotland and analysing the impacts that the sector is having on land use, land reform and community wealth building.

Community Land Scotland members have raised concerns about the impact of industrial coniferous forestry in their local areas, and we as an organisation are concerned about the role of industrial forestry corporations and asset management organisations in further consolidating the ownership and management of Scotland's forests.

These papers are designed to prompt discussion about industrial forestry and what an alternative forestry sector could look like in Scotland which prioritises sustainable timber, community wealth building, climate and biodiversity.

Willie's call for a more integrated, locally focused and active forest management resonates with the community wealth building approach which we have been arguing should underpin all land management in Scotland. Importantly, more active management of Scotland's forests would not only deliver more local economic benefit and better biodiversity outcomes, but it could also improve the quality of timber being produced.

Timber security is a much-discussed topic when the ownership and management of Scotland's forests are debated. Willie's paper adds a helpful reminder that how our forests are managed, and connectedly who owns them as Jon Hollingdale's paper in the series makes clear, has a direct impact upon the quality of the timber we grew, and connectedly why we import so much. If Scotland wants to be timber secure, and produce high quality timber for construction, how our forests are managed needs to be reformed. A clear way of reforming them would be to change some of the ownership patterns, allowing more local ownership and ensuring forests are actively managed over longer timescales to grow quality timber.

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Willie's paper makes a clear call for more local communities and smaller businesses to be able to access land for forestry as part of a holistic change to forestry management, processing and connected benefits for the wider supply chain and industry. Scotland's timber security and need to restore biodiversity could be meaningfully addressed by diversifying the ownership and management of Scotland's forests.

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Active forests, thriving communities: rebalancing Scotland's timber economy

Overview

This paper examines the current role of industrial softwood (conifer) production within Scotland's timber sector, with a focus on its contribution to rural development, community benefit, and inclusive wealth-building. It considers how the sector might significantly enhance its impact — both by increasing local economic participation and by improving the proportion of building-grade timber produced, thereby aligning with broader goals for sustainable construction, land reform, and just transition.

Willie McGhee has worked as a forester since 1990 and was involved in setting up Borders Forest Trust (BFT). He was Executive Director of BFT for 15 years, and worked overseas, setting up Plan Vivo projects, to bring carbon benefits to smallholder farmers and rural communities. He is Forest Manager for Highland Perthshire Communities Land Trust, is a partner in woodland ownership syndicate, assists in community land purchase, such as with the Langholm Initiative, is a Director of the Forest Policy Group and a Trustee with the Community Woodlands Association.

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Introduction

This paper emerges from a context of diverging views but also a shared desire for more, better managed forests. On one hand, the forest industry — including state regulators and managers — feel under pressure from public criticism voiced by environmental groups, communities, and the press[1]. On the other, many local communities, particularly in the south of Scotland and Argyll, feel powerless in the face of the expansion of large-scale conifer plantations. Their concerns are supported by environmental organisations, community advocates, and bodies such as the Royal Society of Edinburgh. Despite these tensions, there is common recognition that forests matter — economically, ecologically, and culturally. This paper makes the case for more active, locally grounded forest management that restores ecological balance and enables communities to access, steward, and benefit from the forests that surround them.

Take home messages:

- Scotland grows the bulk of softwood timber in the UK, **with most harvested timber being transported to large mills, remote from the forests, resulting in few benefits or wealth building opportunities for local communities**.
- Scottish Forestry should consider introducing mechanisms and incentives that persuade timber growers to manage forests and timber such that local communities derive more socioeconomic benefits. **Making afforestation grants conditional on active forest management, with an emphasis on tree thinning**, could stimulate local employment, provide better public access and generate biodiversity gains.
- Scotland's forestry policy and grant giving, and the governance of State forest land have become more centralised over the last 20 years. Forestry and Land Scotland (FLS) often appear to manage public forests in a manner more akin to that of a corporate investment manager[2], than that of a national public body who should be delivering on multiple societal benefits[3]. **Local communities and Local Authorities (LAs) should have more access to managing state and private forests, this could be in partnership with FLS but need not be. The Scottish Government should establish Regional Forestry Boards to oversee Scottish Forestry grants and regulation and the governance of Forestry and Land Scotland. These Boards would be more informed by local knowledge and more accountable to communities.**
- A modest proportion of UK grown timber is used in building construction, often as engineered wood products (cross laminated timber[4]), with much going for short

[1] Forestry Journal editor on frustration within the industry | Forestry Journal
[2] Dereliction of duty by Forestry and Land Scotland at Glenmore in the Cairngorms - parkswatchscotland
[3] Land reform: How state-owned ground should be used to benefit the people and communities of Scotland
[4] Engineered Timber | CLT & Glulam | BSW Timber

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life products such as fencing, pallets, decking, sheds, packaging, wood chips and sawdust. **The building sector perceives that UK grown timber is grown too quickly and lacks the quality of imported timber, i.e., from Scandinavia. Home grown softwood trees managed over longer-time scales can produce high quality timber.**

- The dominant industrial forest management paradigm is rotational clear felling with little active management. Plant the trees, shut the gate, return in 30-40 years harvest all the trees, and remove timber to a distant sawmill or processing facility. This simplistic 'tree farming' paradigm often results in minimal management, limited public access, questionable biodiversity gains, negative impacts on soil and few local jobs. **Actively managing more of Scotland's forests using well established techniques (commonly practiced in other forestry nations) – where forests are 'permanent'[5] - would yield a continuous stream of good quality timber, provide local employment, increase access and increase ecosystem services.**

Timber production and imports

Of the 10 million tonnes of green roundwood timber removed from UK forests in 2023, some 92% was softwood; Scotland is the main softwood producer in the UK, growing 63% of the UK's softwood timber[6]. 50% of UK softwood went to sawmills to become sawn timber, half of which became pallets and fencing. The rest went for wood panels, pulp, wood fuel and 'other'[7].

The UK imports around 80% of its wood, making it the world's second largest importer of wood after China[8]. The reason the UK imports so much timber is due to both quality and quantity. In a 2023 report evaluating the UK timber sector, Stuart Goodall of the Confederation of Forest Industries told the House of Commons Environmental Audit Committee that: "the land area required to be planted with trees to supply all of the UK's timber needs from domestically produced timber could undermine food production"[9]. This recognition that the UK will continue to import timber, despite large-scale afforestation, is telling.

Timber quality

[5] For example, Continuous Cover Forests, where there is no large scale clear felling.
[6] Forestry Statistics 2024 - Forest Research
[7] Includes wood shavings, poles and exports.
[8] Forestry Facts and Figures 2024 - Forest Research
[9] Fifth Report - Seeing the wood for the trees: the contribution of the forestry and timber sectors to biodiversity and net zero goals

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There is a commonly held view amongst timber buyers, wholesalers and builders that UK timber is inferior to imported timber[10]. Some 65% of UK softwood construction timber[11] is imported. Construction timber includes panels and boards. Non-native conifers planted in the UK grow faster than they would in their natural environments, which often results in lower wood density and decreased stiffness[12]. This can reduce suitability as load bearing timber, although there is some debate on the relationship between wood density and strength[13]. Structural softwoods in the UK are graded to C16 (standard strength) or C24 (higher strength) under British Standards (BS EN 338). In buildings, standard grade softwood (C16) is primarily used in applications such as floor joists, roof rafters, and wall framing. Higher strength grade softwood timber (C24) is used in situations where greater loadbearing capacity or longer spans are required and much of this grade of timber is imported. Slow grown trees, grown over long rotations, in the UK can produce C24 grade timber[14] but long term is not deemed 'financially' desirable and requires a change in the mindset and culture of Scottish forestry.

The desirability of growing more, greater volumes of the same quality of softwood in Scotland, when viewed in relation to global timber supply, is debatable. Other countries possess much larger areas of softwood forest and they produce higher quality material for the same cost as can be done in the UK. With the mood music emanating from the timber using industry groups (as opposed to timber growing and processing) embracing expanding global sources of timber and wood products and welcoming an increase in timber and wood product imports[15], it is surely a good time to think carefully about what sort of timber we should and could be growing. We can grow high quality, durable softwoods and hardwoods in Scotland, but the industry is focused on short term returns and appears intent on developing even faster growing trees[16]. The average real[17] price (adjusted for inflation) for a cubic metre of timber in March 1985 was £28.91. In March 2025, it was £26.23[18].

Jobs and timber

The number of sawmills in Scotland has fallen by almost two thirds from 126 to 46 in 30 years. Nine of these mills are considered large – each milling over 25 thousand cubic metres of timber per annum - and they account for some 58% of the 2 million cubic

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[10] https://sciencesearch.defra.gov.uk/ProjectDetails?ProjectId=21391 The main reported barriers to the use of English wood and wood-based products.
[11] Supplying Timber | Issue 08 : Timber Development UK
[12] https://www.thorogood.co.uk/guide/slow-growing-timber/
[13] Rate of growth - Centre for Wood Science & Technology
[14] https://www.researchgate.net/publication/257805633_Effects_of_rotation_length_on_the_grade_recovery_and_wood_properties_of_Sitka_spruce_structural_timber_grown_in_Great_Britain
[15] TDUK Monthly Statistics - March 2025 : Timber Development UK
[16] Super-sitka growing super-fast
[17] The real price is the value of a good, adjusted for the effects of inflation.
[18] Time Series - Forest Research

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metres of UK sawn softwood production by larger mills. Most timber processing in Scotland is located in southern Dumfriesshire, Ayrshire, on the periphery of the East and Northeast coasts, and in Central Scotland, with outliers at the BSW mill at Corpach, the James Jones mills in Kirriemuir and on Deeside[19]. In 2022, the BSW mill at Boat of Garten was closed following a strategic reorganisation by the German parent company, Binderholtz, at a cost of 40 staff [20], highlighting the relative fragility of an industry dominated by a handful of large corporations.

There are no major sawmills in Argyll, the Scottish Borders, Galloway, or the Central, Western (Corpach excepted) and Northern Highlands north of the Dornoch Firth - and most timber harvested in these regions flow to urban or peri-urban centres, remote from the forests, to be processed. This exacerbates the mismatch between the perceived benefits of jobs and development and the reality in most rural communities where little value from harvested timber sticks.

We know that supporting local forestry and timber businesses generates rural jobs and development[21], and there are many small, micro forest-based industries in rural communities. In 2018[22] a study reported some 6,255 people employed, mostly in fragile remote rural communities, generating an annual income and expenditure of approximately £70 million. In comparison, in 2022, employment in UK forestry and wood processing[23] was estimated to be 21,000 and forestry (excluding primary processing) generated some £680 million of Gross Added Value (GVA). However, there could be many more jobs created and GVA generated if more communities and small local businesses had access to local forests and timber.

A 2024 unpublished paper for the Community Woodland Association (CWA), based on member group research extrapolated a CWA group membership employment total of 257 posts. The average CWA group area of managed land was calculated to be some 249 hectares, with a total of 39,840 ha under CWA member management. This equates to one CWA member of staff for every 155ha of woodland.

In 2022, Forestry and Land Scotland (FLS) reported a staff complement of 900, managing 6,400 square kilometres of state forests, this equates to one staff post for every 711 ha under their management. If the current system of community access to managing state forests were made less onerous and less costly for local communities[24], more forests

[19] Timber Processing Sites Map
[20] Boat of Garten: Once thriving sawmill turned into a ghost town | Forestry Journal
[21] local-small-forestry-report.pdf
[22] The economic contribution of small scale woodland businesses in Scotland – Forest Policy Group
[23] Forestry Facts and Figures 2024 - Forest Research
[24] Communities | Forestry and Land Scotland

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could be brought into active management, generating more local employment with resilient and locally sustainable management[25].

Clear fell timber systems, communities, culture and landscape

Plantations of even aged conifer, usually dominated by Sitka spruce, make for poor, monotonous landscapes, lacking in biodiversity and not favoured by local communities. Landscape changes associated with clear felling, are sudden and dramatic and are also unpopular with local communities who do not see any 'upsides or benefits for them and usually suffer from the downsides, abrupt scenery change and many timber lorries on local roads. Clear-fell systems are intensive and ecologically poor. Concessions to environmental objectives usually entail planting corners or edges of the plantation with broadleaf trees and ecological management and habitat connectivity is not integral to the system. Forests end up being compartmentalised, with areas of production separated from token areas of native species planting.

Alternative silvicultural systems should be adopted to address some of the downsides of increasing forest cover and loss of cultural landscapes. Continuous Cover Forestry (CCF) is designed for timber production; however, an emphasis on quality over quantity results in a diverse range of public benefits with secondary environmental service activities, such as soil, watershed, and landscape protection. In addition, smaller woodland units using CCF can become more economically viable if they concentrate on low-volume, high-quality, high price products.

Conclusion

This paper contends that higher levels of GVA could be generated more widely, more equitably, with more people employed in rural Scotland, if local businesses and communities had more, easier access to timber and state forest land, and if government grants required active forest management. Active forest management over long timescales will yield quality timber, create more local permanent, year-round employment, and will require training and apprenticeships to bring young people into the forest workforce. The Scottish Government can take a lead in moving the sector towards a more sustainable, resilient and people centred type of forestry by creating Regional Forestry Boards to oversee Scottish Forestry grants and regulation, and to provide an accountable level of governance for Forestry and Land Scotland.

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[25] Forest and Land Scotland's "concept proposals" for Glen Prosen and the re-wilding alternative - parkswatchscotland