
Ireland's Forests - Annual Statistics

2015



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The Forest Service of the Department of Agriculture, Food and the Marine is responsible for ensuring the development of forestry within Ireland in a manner and to a scale that maximises its contribution to national socio-economic well-being on a sustainable basis that is compatible with the protection of the environment. Its strategic objectives are:

1. To foster the efficient and sustainable development of forestry;
2. To increase quality planting;
3. To promote the planting of diverse species;
4. To improve the level of farmer participation in forestry;
5. To promote research and training in the sector;
6. To encourage increased employment in the sector.

The Forest Service supports the forestry sector through a range of incentives to:

1. support afforestation using a range of tree species,
2. facilitate the development of the processing sector;
3. train forest owners to manage their forests.

1 Introduction

The Forest Service has the responsibility for the collection and publication of forest statistics.

Forest stakeholders and policy makers require reliable statistics upon which to plan and make decisions. Ireland also has a series of international reporting requirements relating to forests and forestry. These include the United Nations Framework Convention on Climate Change (UNFCCC) for carbon stocks and stock changes, the Decision 529/2013/EU on land use, land-use change and forestry, the Food and Agriculture Organisation (FAO) for series of forest related data including the Global Forest Resource Assessment, EUROSTAT, FAO, ITTO and the United Nations Economic Commission for Europe (UNECE) for wood harvest and trade data, (the Joint Forest Sector Questionnaire), the Joint Wood Energy Enquiry of the UNECE, IEA, FAO and the European Commission in respect of forest health.

An annual forest statistics report had been published by the state since its foundation up to 1988, but was discontinued thereafter. This publication reinstates annual reporting on the forest estate and forest industry and brings together previously published and new statistics into a single publication.

Forest Service data revision and correction policy

While every effort is made to ensure the accuracy of data provided, amendments can occur as new data become available or errors are detected and corrected.

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2 Forest Area

2.1 Introduction

This chapter contains statistics on:

- Irish forest area and area changes over time;
- Forest ownership;
- Tree species composition;
- Age structure of the forest estate.

Key Facts

- The area of forest is estimated to be 731,650 ha or 10.5% of the total land area of Ireland (NFI 2012);
- Forest cover is estimated to be at its highest level in over 350 years;
- Of the total forest area, nearly 396,000 ha or 54.1% is in public ownership, mainly Coillte¹;
- The forest estate is comprised of three quarters conifers and one quarter broadleaves;
- Nearly three quarters of the stocked forest area is less than 30 years of age.

¹Coillte is a State owned company operating in forestry, land based businesses and added-value processing operations. The company was established as a private limited company under the Forestry Act 1988 which set out its objectives and duties. The company's shareholders are the Minister for Finance and the Minister for Agriculture and Food.

2.2 Forest definition

Forest is defined as land with a minimum area of 0.1 ha under stands of trees 5 m or higher, having a minimum width of 20 m and a canopy cover of 20% or more within the forest boundary; or trees able to reach these thresholds *in situ*. The forest definition relates to land use rather than land cover, with the result that open space within a forest boundary either permanently or temporarily unstocked with trees, along with felled areas that are awaiting regeneration, are included as forest.

2.3 Forest area

In 2012, the National Forest Inventory (NFI) estimated that the area of forest was 731,650 hectares or 10.5% of the land area, excluding inland water bodies (Table 1 and Figure 1). Of the total forested area, 653,980 ha comprises areas occupied by trees or potentially occupied by trees, while permanently unstocked open area within the forest (roads, ridelines, powerlines, etc.) comprise 77,670ha (Table 1). Conifers account for 68.6%, broadleaves 17.5% and mixed forests 13.9% of the stocked forest area.

Table 1 Forest Area 2012

Land use category	Area (ha)	% of total land area
Forest	653,980	9.5
Forest open area	77,672	1.0
Total	731,652	10.5

2.4 Hedges, Trees & scrub outside of forest and other wooded land

Teagasc developed a hedge map in 2010 based on 2005 colour orthophotography. In 2005, the total area of hedges, trees & scrub outside of the forest was 482,000ha or 6.9% of the total land area of Ireland².

² [The Irish Hedge Map – Version 1.0. 2010. Teagasc.](#)

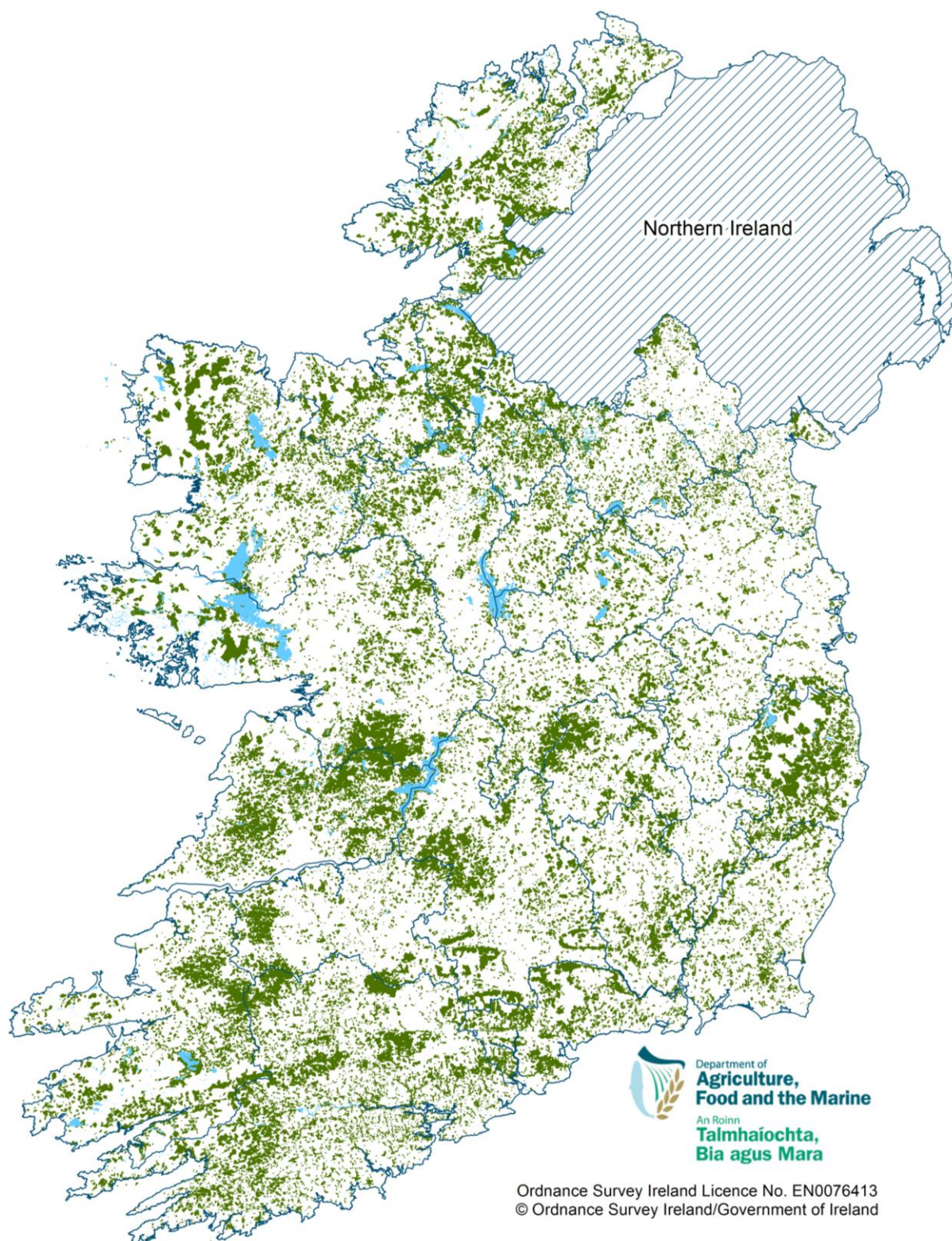


Figure 1. Ireland's forest estate 2014.

2.5 Forest area changes over time

The 731,650 ha of forest in Ireland in 2012 represents 10.5% of the total land area. The changes in forest cover in Ireland since 1656 are indicated in Table 3 and Figure 2. All estimates prior to 1918 relate to the whole of the island of Ireland, thereafter estimates are for the Republic of Ireland only. A 1905 forest cover estimate for the province of Ulster was 15,000 ha, but overall on the island of Ireland forest cover was still declining up to 1928.

Since the foundation of the State the area of land under forest in Ireland has grown from 1.4% of the land area, to the current 10.5%. Figure 3 shows the growth in area of both public and private forests over this period. Three inventories of the private forest estate have taken place: 1973, 2006 and 2012. The area of privately- owned forests has increased from 81,958 ha in 1973 to 335,900 ha in 2012; over a four-fold increase. Over the same period the state-owned forest area has also significantly increased from 242,056 ha to 395,760 ha.

Table 3. Forest area in Ireland

Year	Area (ha)	% of Total Land Area
1656 ³	170,000	2.5
1841 ⁴	140,000	2.0
1908 ⁵	125,200	1.8
1918 ⁶	100,717	1.4
1928 ⁷	89,000	1.2
1949 ⁸	144,000	2.1
1965 ⁹	254,350	3.7
1973 ¹⁰	323,654	4.6
1985 ¹¹	411,529	5.9
2006 ¹²	697,730	10.1
2012 ¹³	731,650	10.5

³ Rackham, O.1986. *The History of the Countryside*. Dent & Sons Ltd., London.

⁴ Aalen, F.H.A, Whelan K. And Stout M. (Eds). 1997. *Atlas of the Irish Rural Landscape*. Cork University Press

⁵ Dept. Of Agriculture & Technical Instruction. 1908. *Report of the Departmental Committee on Irish Forestry*. A. Thom & Co., 1908.

⁶ Dept. of Agriculture. 1926. *Forest Lands and Timber Supply in the Irish Free State*. Proceedings of the First International Congress on Sylviculture, Rome, 1926.

⁷ Minister for Lands & Agriculture. Dail Eireann, Volume 23, 3rd May 1928.

⁸ Estimate generated from Annual Report of the Department of Agriculture 1943/49.

⁹ Estimate generated from Annual Report of the Department of Agriculture 1964/65.

¹⁰ Estimate generated from Purcell, T.J, 1973. *Inventory of Private Forests -1973*.Department of Fisheries and Forestry and Annual Report of the Department of Agriculture 1972/73.

¹¹ Estimate generated from Annual Report of the Department of Agriculture 1985.

¹² *National Forest Inventory Republic of Ireland Results*. 2007. Forest Service, Department of Agriculture Fisheries and Food.

¹³ *National Forest Inventory Republic of Ireland Results*. 2013. Forest Service, Department of Agriculture Food and the Marine.

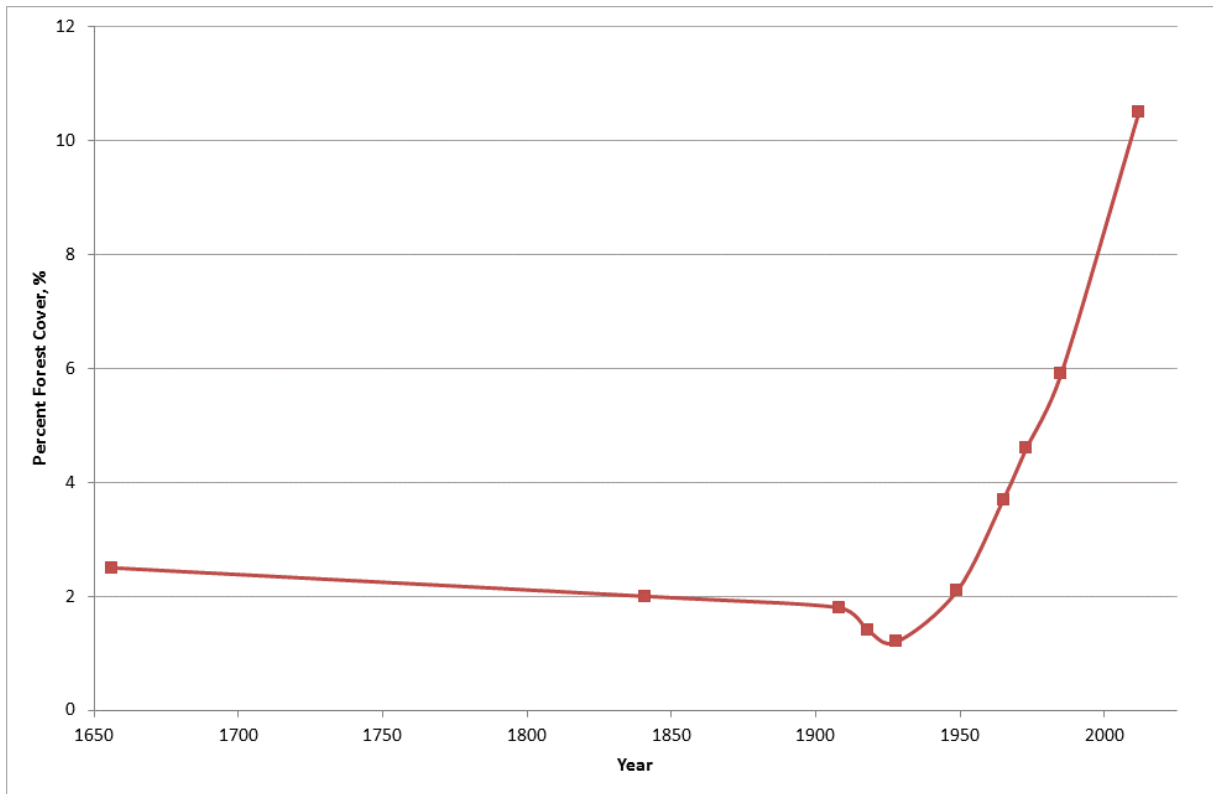


Figure 2. Forest cover, 1656-2014.

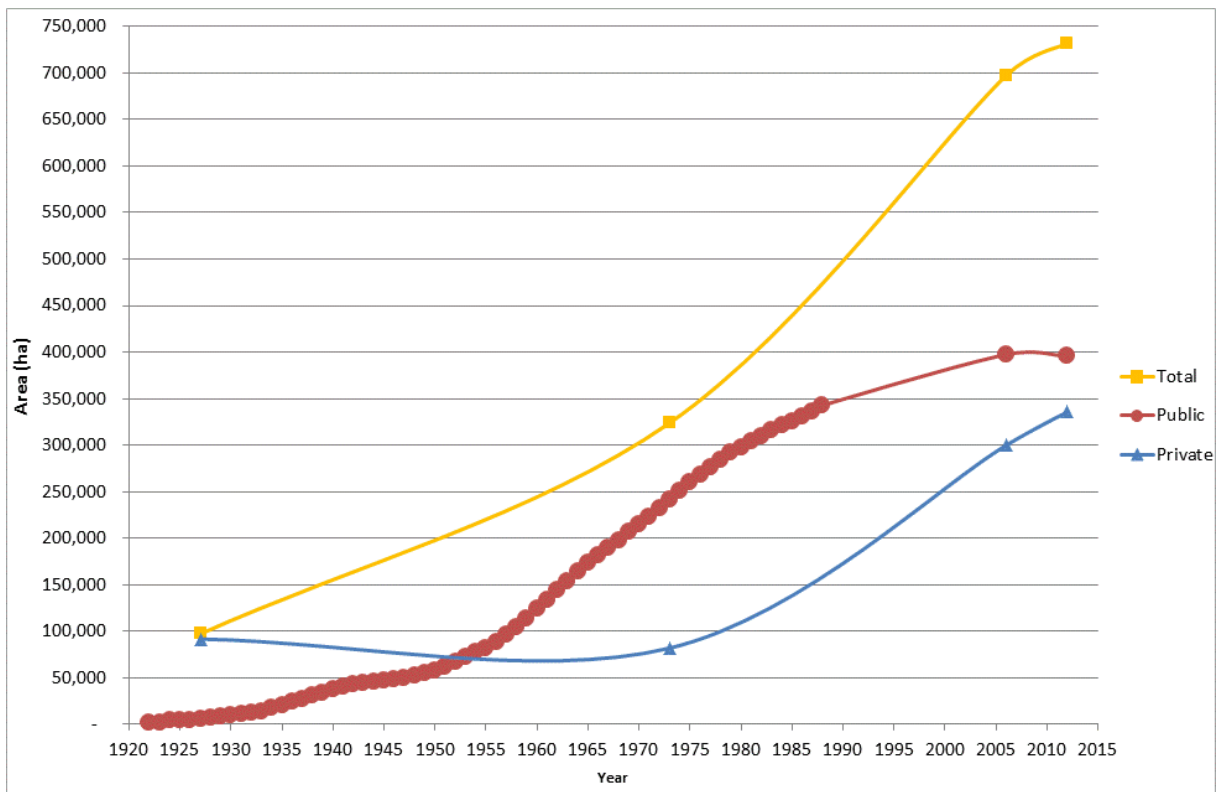


Figure 3. Forest area change since the foundation of the State, 1922-2014.

2.6 Forest Ownership

Within the national forest estate there are three main forest ownership categories:

1. **Public:** all state owned forests, mainly Coillte;
2. **Private (grant aided):** private afforested land which was in receipt of either grant and/or premium since 1980;
3. **Private (other):** private forests not in receipt of grant-aid post 1980.

In 2012, 54.1% of forests were in state ownership, a reduction from 57% in 2006 (primarily due to private sector afforestation in the intervening period). Of the public forest area (Table 4), the total forest area of 395,760 ha comprises 359,320 ha of stocked forest land and 36,440 ha of forest open area. Of the public forests Coillte owns 337,300 ha, or 93%.

Table 4. Forest ownership in Ireland (Source: NFI, 2012)

Ownership	Area (ha)	%
Public	395,760	54.1
Private (grant aided)	246,550	33.7
Private (Other)	89,350	12.2
Total	731,650	100

2.7 Species composition

Sitka spruce is the most common species, occupying 52.4% of the forest area (Table 5). Over one quarter of the forest estate contains broadleaves. Of the broadleaves 33.9% are 'Other broadleaf species' (both long living and short living), of which over half are willow¹⁴. The next largest broadleaf species group was birch species (22.7%), ash (12.5%), followed by oak (10.2%). Conifers occupy 472,830ha while broadleaved species cover 164,310ha.

The interpretation of stocked areas of individual species presented in Table 5 needs to be carefully considered since many forests contain an intimate mixture of species. Methods are used to apportion the constituent individual species from these intimate mixtures into the total area covered by the forest. The total stocked area of a given species therefore does not represent distinct areas of land covered by pure stands of the species, but represent the areas of mixed forest apportioned to them.

¹⁴ For most NFI statistical outputs, it was more convenient to work with the species groups than with individual species. The data would not have been sufficiently representative if processed by species. The species group composition of long living broadleaves are as follows: field maple, maple, horse chestnut, strawberry tree, hornbeam, sweet chestnut, holly, notofagus sp., white poplar, black poplar, Turkey oak, red oak, whitebeam, small-leaved lime, large-leaved lime, wych elm. The species group composition of short living broadleaves are as follows: crab apple, aspen, cherry, blackthorn, goat willow, other willows, mountain ash, and hazel.

Table 5. Tree Species Composition (Source: NFI, 2012)

Species	Area (ha)	%
Sitka spruce	334,560	52.4
Norway spruce	26,340	4.1
Scots pine	8,010	1.3
Other pine spp.	61,950	9.7
Douglas fir	10,380	1.6
Larch spp.	27,740	4.4
Other conifers	3,850	0.6
Pedunculate and sessile oak	16,840	2.6
Beech	9,500	1.5
Ash	20,610	3.2
Sycamore	9,250	1.5
Birch spp.	37,370	5.9
Alder spp.	15,080	2.4
Other short living broadleaves	46,220	7.3
Other long living broadleaves	9,440	1.4
Total	637,140	100

2.8 Forest age

Just under three quarters of the national forest estate consists of trees of 30 years old or less (Figure 4). Conifers tend to have a shorter rotation than broadleaves; 91.5% of conifers are 30 years old or less while 74.4% of broadleaves are 30 years old or less. The age structure of the national forest estate differs according to ownership: public and private grant-aided categories have 90.9% of forests aged 30 years or less ; while the Private Other category has 47.7% forests aged 31 years and more (Figure 4).

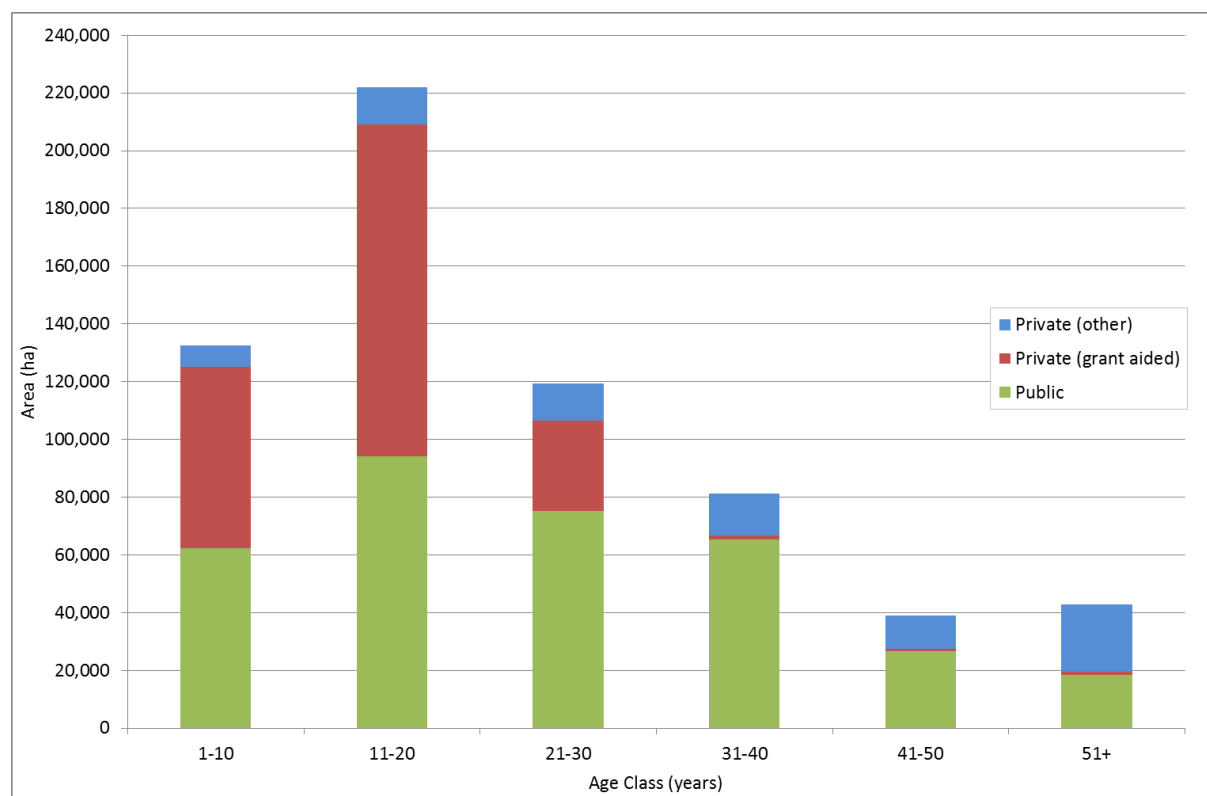


Figure 4. Forest age-class distribution by ownership (Source: NFI, 2012).

3. Afforestation

This section provides information on afforestation levels since the foundation of the State, with a particular emphasis on private afforestation since 1980.

3.1 Introduction

This chapter provides information on:

- Species composition of afforestation;
- Forest size and number of private grant aided afforestation since 1980;
- Ownership and forest size patterns of private grant-aided afforestation since 1980;
- Ownership patterns of private forests established prior to 1980.

Key statistics

- State afforestation was relatively low up until the 1950s, but thereafter increased up to the year 2000;
- Private afforestation came to the fore in the mid-eighties: over 270,000 ha of private forests were established between 1980 and 2014;
- The proportion of broadleaf afforestation significantly increased after 1993, and up to the present, comprising 23% of all afforestation since that year;
- Tree diseases such as *Phytophthora ramorum* (mainly larch) and *Chalara fraxinea* (ash) may influence species diversity into the future;
- 85% of private forest owners are classified as farmers;
- 83% of the forests afforested since 1980 have been planted by farmers;
- The average size of private grant-aided afforestation since 1980 is 9.0 ha;
- Since 1980, nearly 20,000 unique private forest owners have received grant aid to establish forests;
- Nearly half of all individual owners have received afforestation grant aid at least twice since 1980, which should contribute to management efficiencies .

3.2 Afforestation 1922-2014

As shown in Table 2, forest cover on the island of Ireland continued to decline up to 1928. With the introduction of the first Forestry Act in 1928 the decline of forest area was largely halted. However afforestation levels remained relatively low right up until the 1950s. The level of state afforestation dramatically increased from the 1950s up to 2000, after which state planting declined to a negligible level. One critical factor was the decision by the European Commission in August 1999 that Coillte Teoranta was not entitled to receive annual [non-farmer] forest premiums. The European Court of Justice (ECJ) subsequently upheld this decision. In the 10 years from 1990 to 1999, 43% of all afforestation was on Coillte land. As a result, Coillte reviewed its planting programme and has not engaged in afforestation to any appreciable extent since the ECJ decision.

Private afforestation came to the fore in the mid-80s following the introduction of a grant and particularly an annual premium scheme for afforestation. Long-run afforestation trends, including the change from state-led to private-led grant-aided afforestation in the 1980s and 1990s, are shown in Figure 5.

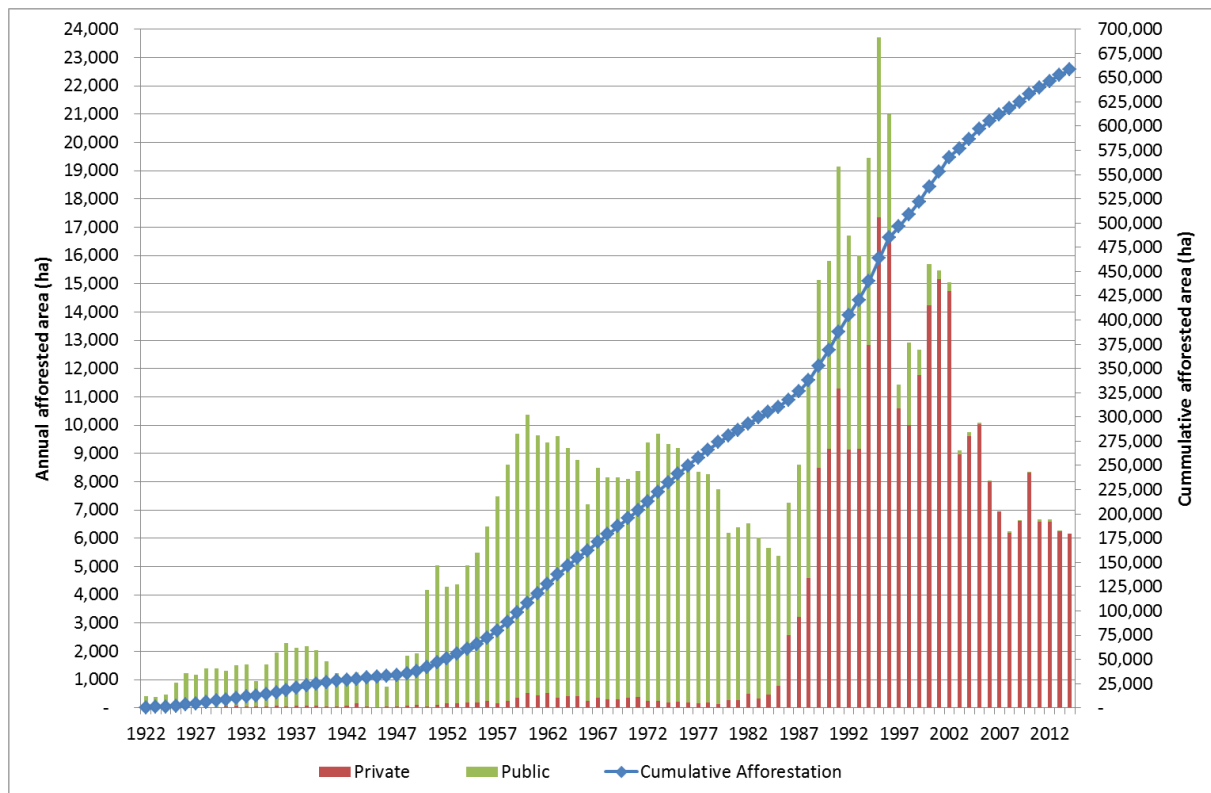


Figure 5. Annual state and private afforestation 1922-2014.

Afforestation, conifers: broadleaves, averaged 90:10 during the 1930s and 1940s. Thereafter, up to the early 1990s, broadleaves comprised 4% of afforestation. As a result of the positive differential in favour of broadleaf species in both the afforestation grant and premium schemes the proportion of broadleaves planted significantly increased from 1993 up to the present, with an average of 23% broadleaves planted since that year.

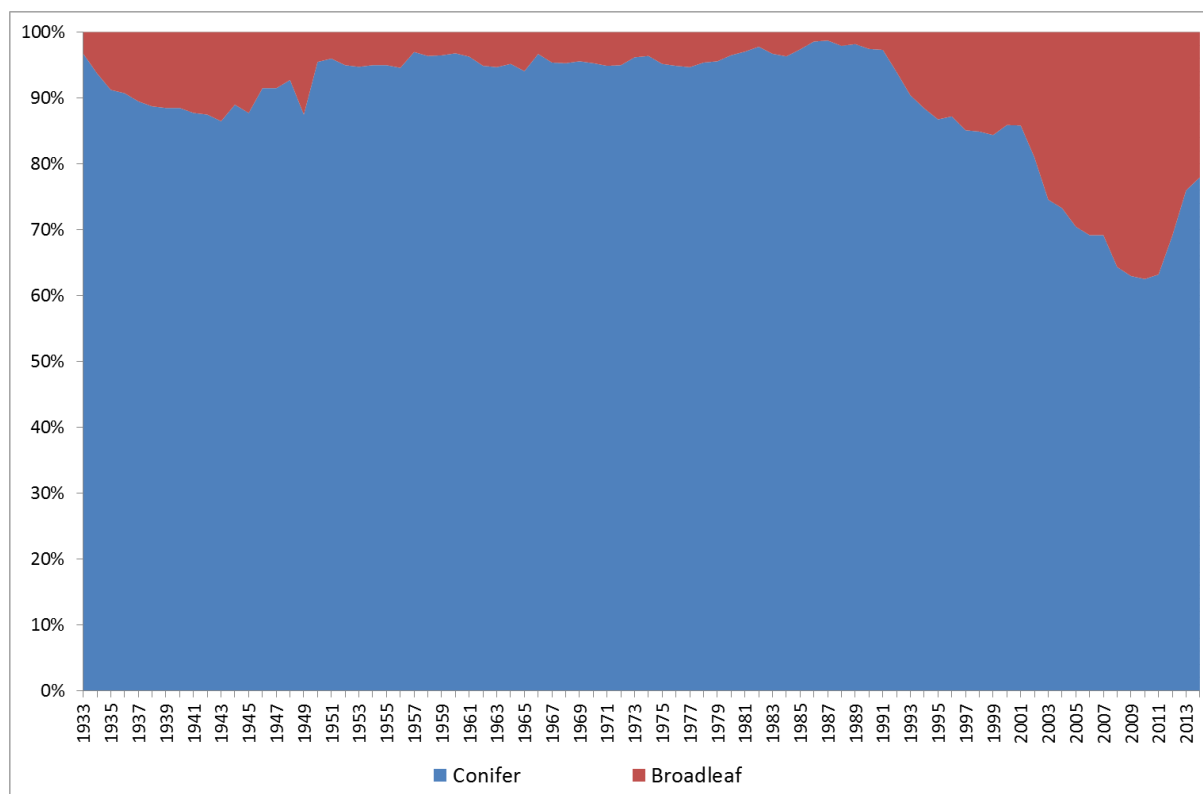


Figure 6. Conifer - broadleaf afforestation 1933-2014.

A range of conifer species were planted in the 1930s and 1940s, including Norway spruce, Scots pine and larch, along with Sitka spruce and Lodgepole pine. This reflected the untested nature of the North American species being planted at the time. From the 1950s onwards confidence in Sitka spruce and Lodgepole pine grew, leading to their dominance in afforestation up to the mid-90s, after which the role of Lodgepole pine declined, reflecting primarily the improved land quality available for afforestation after this period (Figure 7) and the generally poor form of the species.

From 2006 to 2010 the species composition of afforestation remained largely stable. However the finding of *Phytophthora ramorum* in Japanese larch in 2010, led to its withdrawal from the afforestation programme (Figure 8). From the mid-90s onwards a wider range of tree species has been planted, with ash and oak dominating broadleaf planting. However, more recently, the fungal disease *Chalara fraxinea* was found in ash in 2012, resulting in the cessation of grant aid for this species. Nearly 17,000 ha of ash have been planted since 1990 (Figure 9).

Sitka spruce remains the predominant species used in Irish forestry. It has proven to be one of the most productive conifers in Ireland and as such has become the mainstay in roundwood processing.

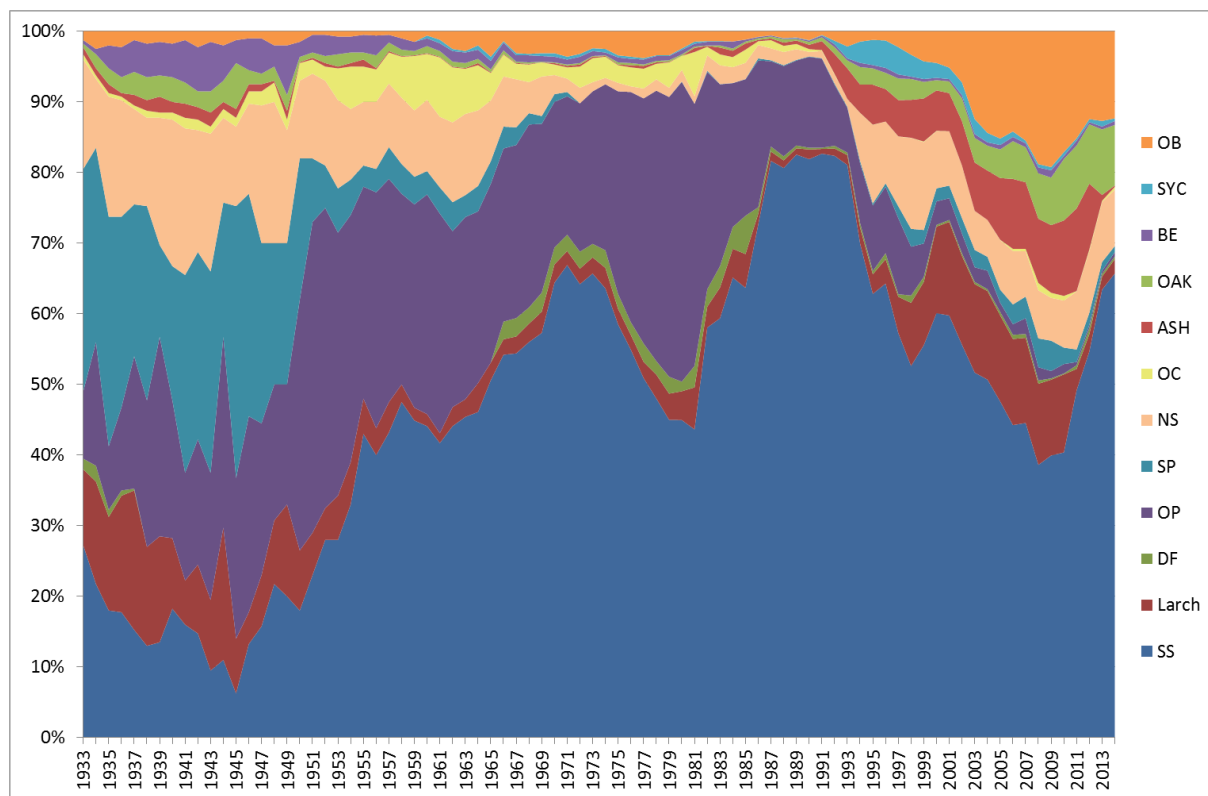


Figure 7. Species groups used in afforestation 1933-2014¹⁵

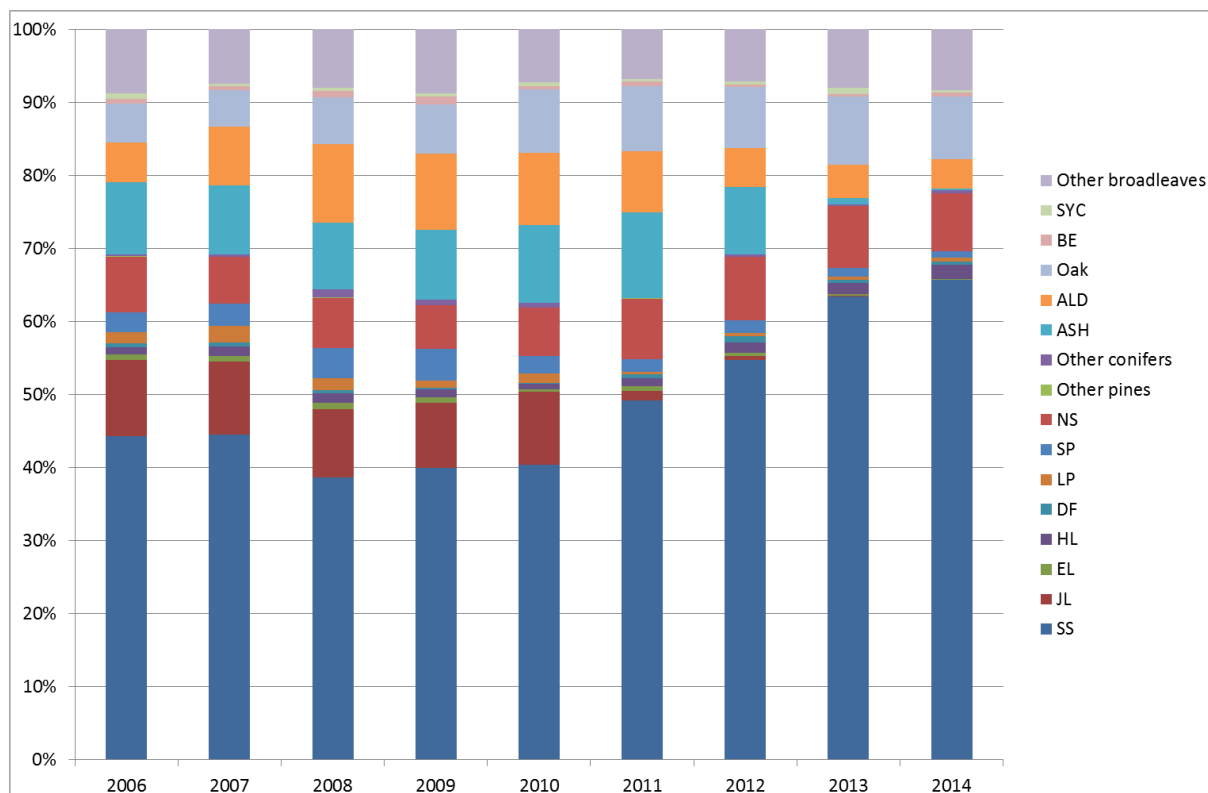


Figure 8. Grant-aided species groups, 2006-2014

¹⁵ Legend Key: OB= Other Broadleaves, SYC = Sycamore, BE = Beech, Oak= Pedunculate and Sessile Oak, Ald= Alder, NS= Norway spruce, SP = Scots pine, LP = Lodgepole pine, DF = Douglas fir, HL = Hybrid larch, EL = European Larch, JL = Japanese larch, SS = Sitka spruce.

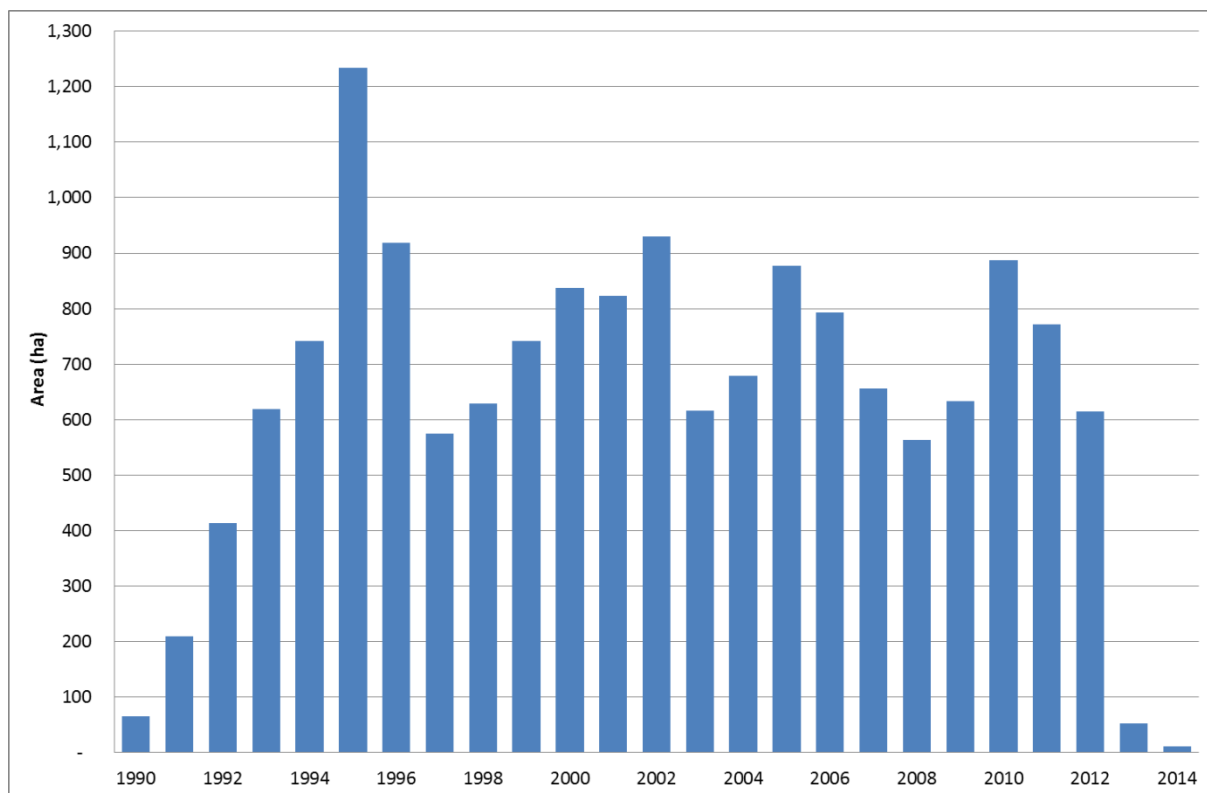


Figure 9. Ash afforestation 1990-2014.

3.3 *Private lands afforested, forest size and number*

This section provides statistics of private lands afforested over the period 1980 to 2014. The average size of private grant-aided afforestation since 1980 to 2014 was 9.0 ha (Table 6). From 1980 up to the mid-80s the average afforestation parcel was relatively small at 5.9 ha. With the introduction of the grant and premium scheme average afforestation increased to 9.6 ha.

A significant proportion of private afforestation in the 90s was “whole farm” planting and planting on unenclosed land. By 2014 the average area afforested has decreased to 6.0 ha as a result of planting mostly within individual agricultural holdings and a movement away from unenclosed land.

In terms of the size class contribution to overall afforestation since 1980, the distribution is slightly skewed towards parcels of 10-30 ha; over a wide range from 0.1 ha to over 100+ ha (Figure 10). Figure 11 shows that large sized individual plantings were a feature of mid-80s - late 90s planting, with 49% of individual forests being 20 ha or greater and 11% over 100 ha in size. The threshold for a mandatory Environmental Impact Assessment (EIA) was reduced from 200 to 70 ha in 1996. As a result the size of afforestation parcels decreased between 1997 and 2002, with 32% of afforestation parcels were greater than 20 ha in that period. In 2001 the EIA threshold was further reduced from 70 to 50 ha along with sub threshold EIAs in the case of afforestation likely to have a significant effect on the environment. Since 2002, 20% of afforestation parcels have been greater than 20 ha; in the last 10 years no individual forest greater than 50 ha has been established. Since 2010 all afforestation applications are screened by the Forest Service to determine whether they require an EIA; all developments over 50 ha are subject to a mandatory Environmental Impact Statement.

Table 6. Size and number of individual private grant-aided afforestation 1980-2014.

Year	Number of parcels		Mean forest size (ha)	
	Annual	Cumulative	Annual	Cumulative
1980	53	53	3.4	3.4
1981	46	99	7.0	5.1
1982	70	169	4.2	4.7
1983	82	251	4.3	4.6
1984	108	359	3.2	4.2
1985	156	515	6.7	4.9
1986	269	784	7.8	5.9
1987	386	1,170	7.5	6.4
1988	484	1,654	9.3	7.3
1989	720	2,374	11.7	8.6
1990	718	3,092	11.6	9.3
1991	779	3,871	9.3	9.3
1992	621	4,492	9.4	9.3
1993	1,036	5,528	8.0	9.1
1994	1,341	6,869	10.2	9.3
1995	1,464	8,333	11.2	9.6
1996	1,473	9,806	9.4	9.6
1997	1,276	11,082	9.2	9.6
1998	1,133	12,215	9.8	9.6
1999	1,141	13,356	10.4	9.6
2000	1,289	14,645	10.8	9.7
2001	1,370	16,015	10.5	9.8
2002	1,267	17,282	9.9	9.8
2003	1,131	18,413	8.7	9.7
2004	950	19,363	9.1	9.7
2005	1,340	20,703	8.4	9.6
2006	1,127	21,830	8.0	9.5
2007	836	22,666	7.2	9.5
2008	684	23,350	8.1	9.4
2009	729	24,079	8.7	9.4
2010	944	25,023	8.1	9.3
2011	889	25,912	7.4	9.3
2012	899	26,811	6.5	9.2
2013	986	27,797	6.6	9.1
2014	959	28,756	6.0	9.0

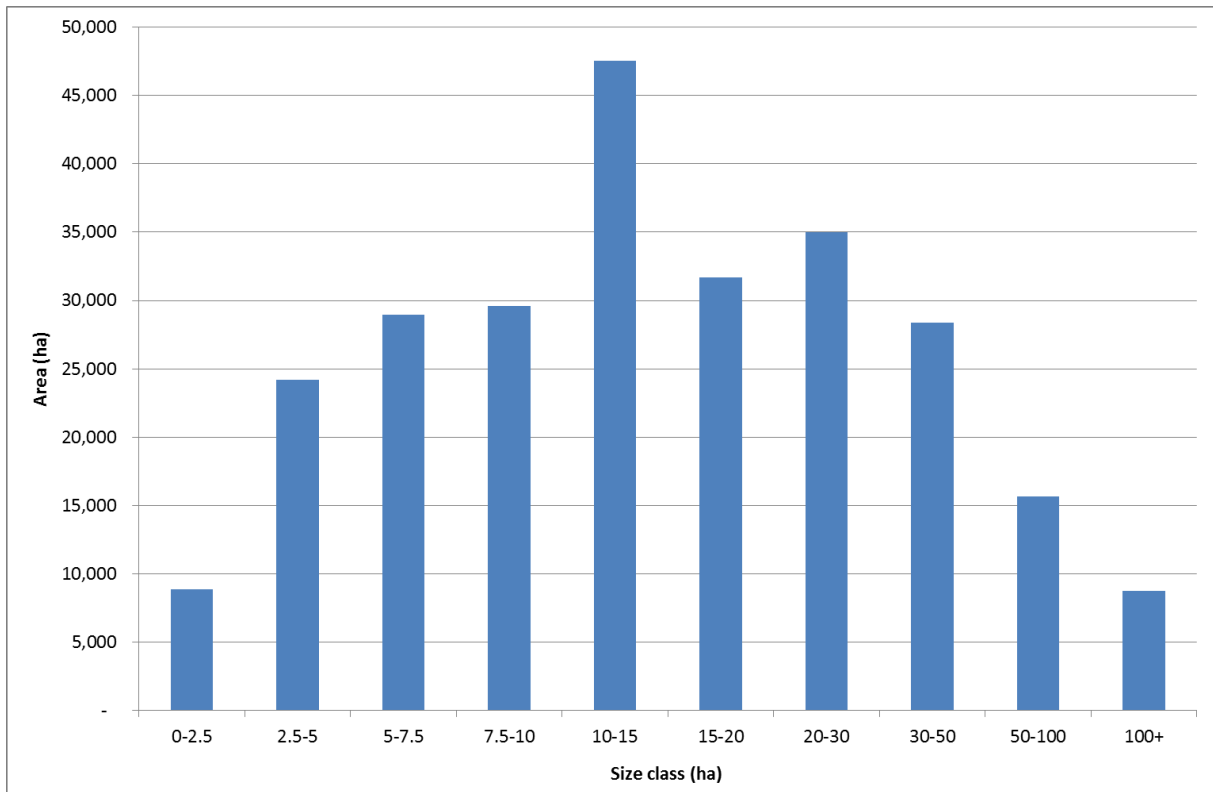


Figure 10. Size class distribution of private grant-aided afforestation 1980-2014.

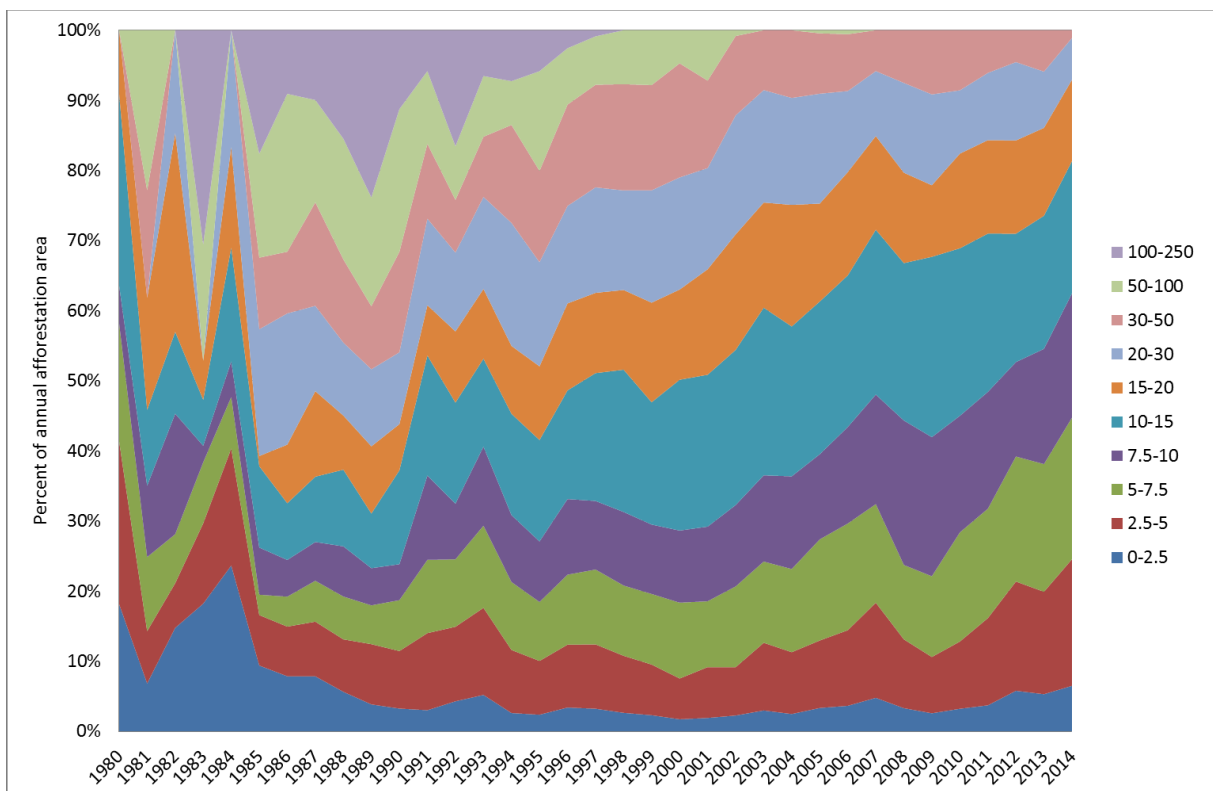


Figure 11. Proportion of annual afforested area by size class of private grant aided afforestation from 1980-2014.

3.4 Private afforestation ownership

This section provides information on the nature of private forest owners who afforested between 1980 and 2014¹⁶.

3.4.1 Farmer/non-farmer

Farmers accounted for 83% of private lands afforested between 1980 and 2014. Farmers and non-farmers were planting, on average, equal amounts of forest throughout the 80s and up to the early 90s. A feature of the period was the higher average forest parcel size planted by non-farmer investors (15 ha), compared to an average of 5 ha for farmers (Figure 12). From 1993 up to the present day farmer planting has dominated afforestation (Figure 13).

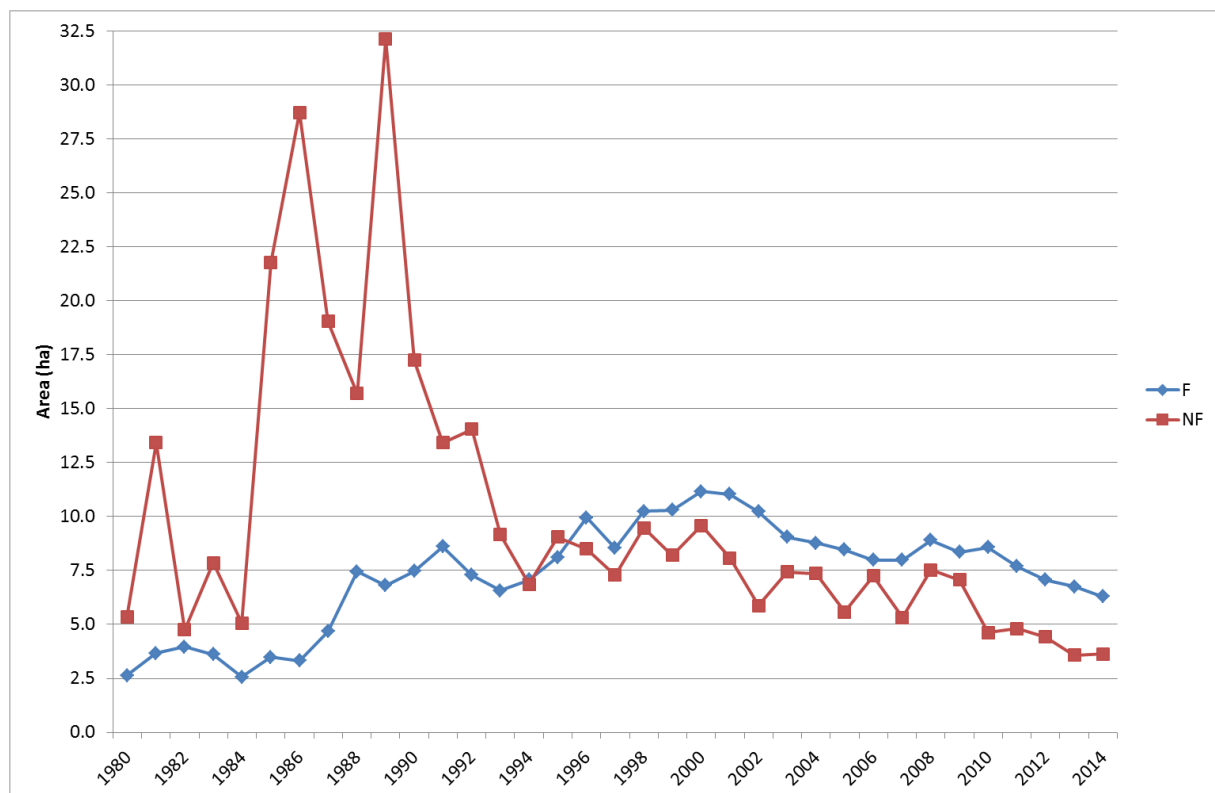


Figure 12. Average forest area of Farmer/Non-Farmer private grant-aided afforestation 1980-2014.

¹⁶ The year data refers to when the forest was planted.

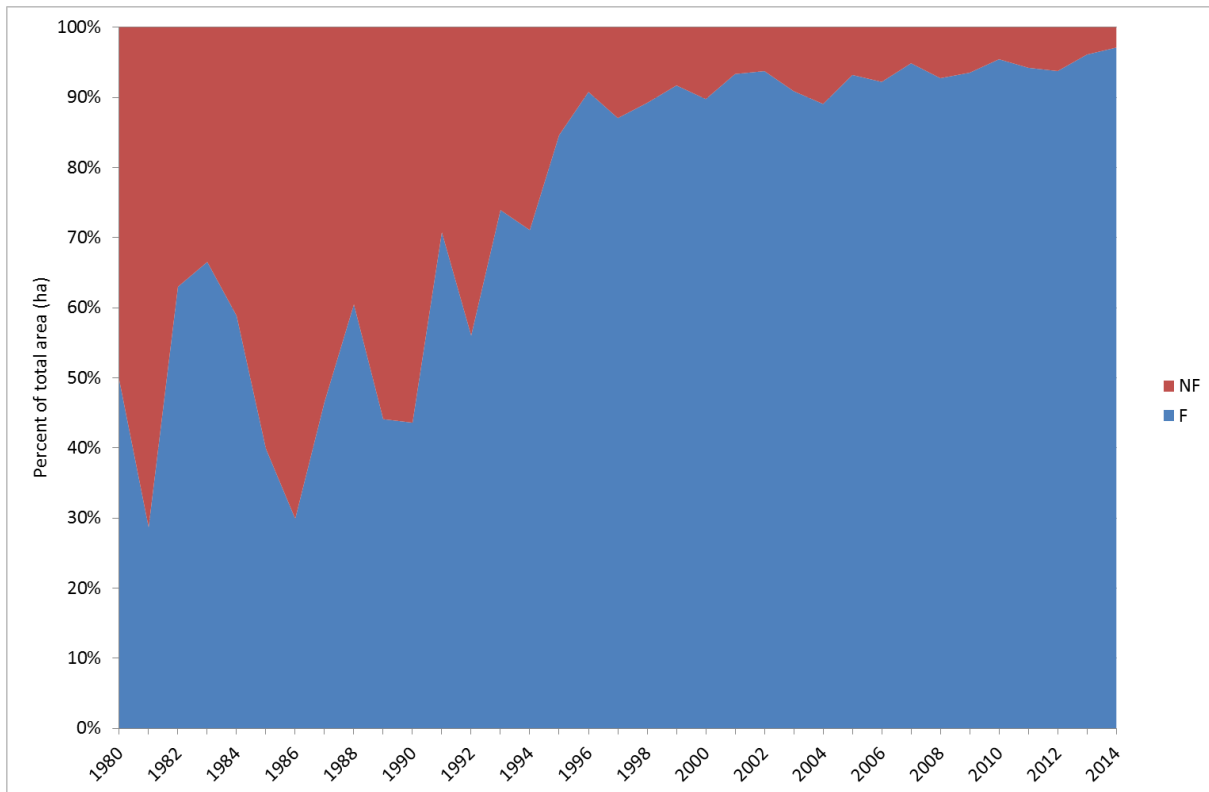


Figure 13. Farmer and Non-Farmer participation in afforestation from 1980- 2014.

3.4.2 Number of grant aided forests planted by unique owners in 2014

It has been common for forest owners to afforest more than one forest. Table 7 details the number of individual forest owners who have had one or more grant aided forests planted since 1980. Some 79.2% of owners have planted one forest, accounting for 140,282 ha. In terms of overall area, nearly half of the individual owners have had two or more grant aided forests planted.

While these forests may not be all contiguous, the information presented shows that the private grant-aided forest estate is less fragmented than considered heretofore. It also shows potentially more consolidated forest holdings among individual owners than was heretofore assumed.

Table 7. Number of private grant aided forests planted by unique owner and associated area (1980-2014).

No. of forests	No. of unique owners	Area ha	Owner %	Area %
1	16,264	140,282	79.2	54.3
2	2,917	48,465	14.2	18.7
3	796	20,792	3.9	8.0
4	254	9,383	1.2	3.6
5	113	6,251	0.6	2.4
6-7	95	7,009	0.5	2.7
8-9	36	3,285	0.2	1.3
10-19	43	8,040	0.2	3.1
20-49	20	8,021	0.1	3.1
50+	4	7,045	0.0	2.7
Total	20,542	258,572	100	100

3.4.3 Annual grant applications by unique owner

As stated, when assessing the average size of the total forest holdings of individual owners a profile of a less fragmented private forest estate emerges when compared to using a simple average of individual afforestation areas. By 2014, the average cumulative area afforested by unique owners was 12.6 ha (Table 8), compared to the average individual afforestation areas of 9.0 ha (Table 6). Looking only at the average size of individual afforestation areas ignores the fact that some owners have afforested multiple forest holdings over time (Figure 15).

Table 8. Number of grant applications per owner and associated afforested areas 1980-2014.

Year	No. of unique owners		Mean forest size (ha)	
	Annual	Cumulative	Annual	Cumulative
1980	46	46	3.9	3.9
1981	41	74	7.8	6.8
1982	70	133	4.2	6.0
1983	78	193	4.5	6.0
1984	104	272	3.3	5.5
1985	142	382	7.4	6.7
1986	229	573	9.1	8.1
1987	353	860	8.2	8.7
1988	464	1,239	9.7	9.7
1989	659	1,789	12.7	11.4
1990	647	2,331	12.9	12.3
1991	764	3,058	9.5	11.8
1992	595	3,582	9.8	11.7
1993	938	4,411	8.9	11.4
1994	1,249	5,504	11.0	11.6
1995	1,353	6,624	12.1	12.1
1996	1,359	7,708	10.2	12.2
1997	1,164	8,597	10.1	12.3
1998	1,041	9,386	10.7	12.5
1999	1,037	10,181	11.4	12.7
2000	1,158	11,014	12.0	13.0
2001	1,247	11,959	11.5	13.1
2002	1,133	12,780	11.0	13.3
2003	1,004	13,460	9.7	13.3
2004	830	14,058	10.4	13.4
2005	1,183	14,900	9.5	13.4
2006	1,025	15,629	8.8	13.3
2007	759	16,162	7.9	13.3
2008	628	16,616	8.9	13.2
2009	693	17,143	9.2	13.2
2010	896	17,828	8.5	13.1
2011	856	18,513	7.7	13.0
2012	837	19,174	7.0	12.8
2013	919	19,874	7.1	12.7
2014	893	20,542	6.5	12.6

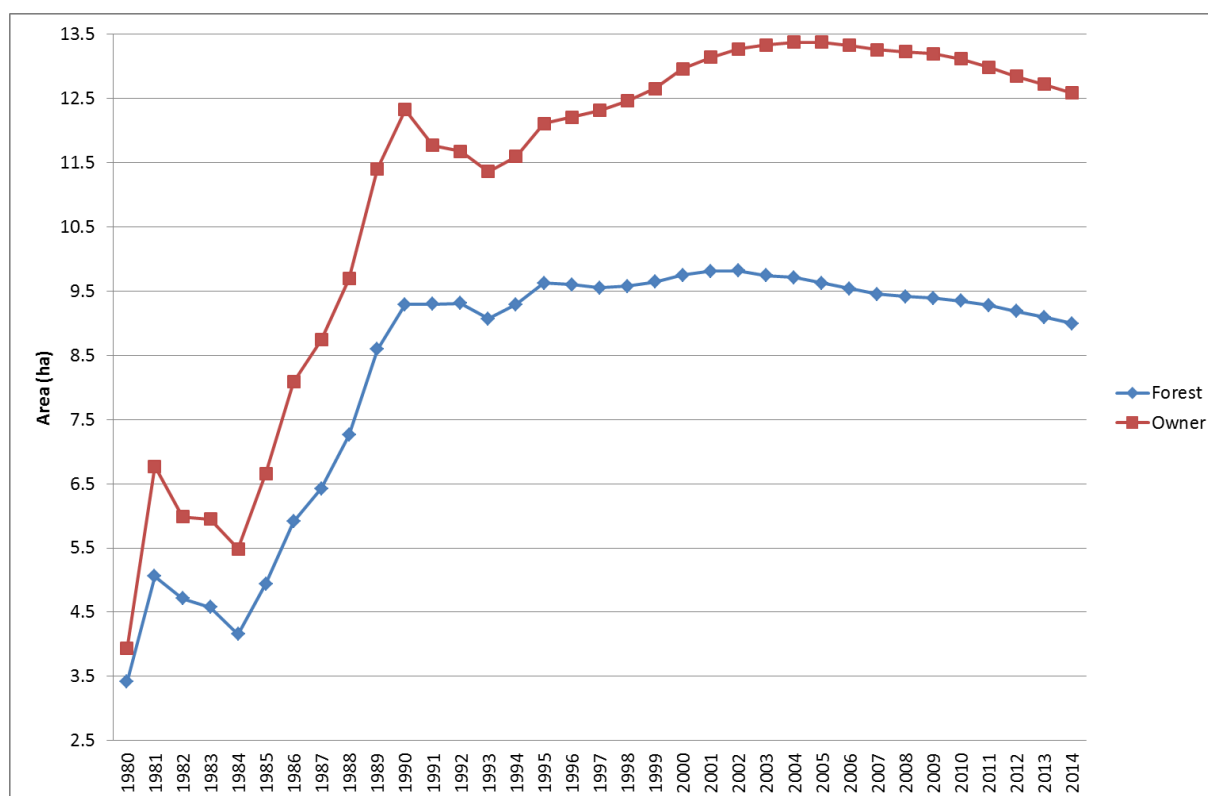


Figure 15. Average private grant-aided afforested area; individual forest area vs. cumulative forest owner area.

3.4.4 Number of individual private forest owners per county

The number of unique owners that have afforested by county is detailed in Table 9. It should be noted that individual owners recorded in any one year may have subsequently planted again in the following years.

Table 9. Cumulative number of unique owners and area by county in 1980-2014

County	No. owners	Area ha
Carlow	201	1,594
Cavan	653	7,141
Clare	1,649	21,089
Cork	2,656	28,701
Donegal	910	15,520
Dublin	78	816
Galway	1,320	14,843
Kerry	1,950	27,827
Kildare	327	3,223
Kilkenny	770	8,894
Laois	504	6,637
Leitrim	644	9,948
Limerick	985	12,734
Longford	486	4,756
Louth	71	640
Mayo	1,509	17,952
Meath	391	4,204
Monaghan	257	1,683
Offaly	618	8,015
Roscommon	968	11,063
Sligo	740	8,110
Tipperary	1,404	17,989
Waterford	641	7,096
Westmeath	477	6,569
Wexford	608	5,227
Wicklow	534	6,302

3.4.5 Age profile of forest owners in receipt of annual afforestation premium payments

In 2013 owners aged 50 years and older hold nearly 78% of afforested lands in receipt of a premium (Figure 16).

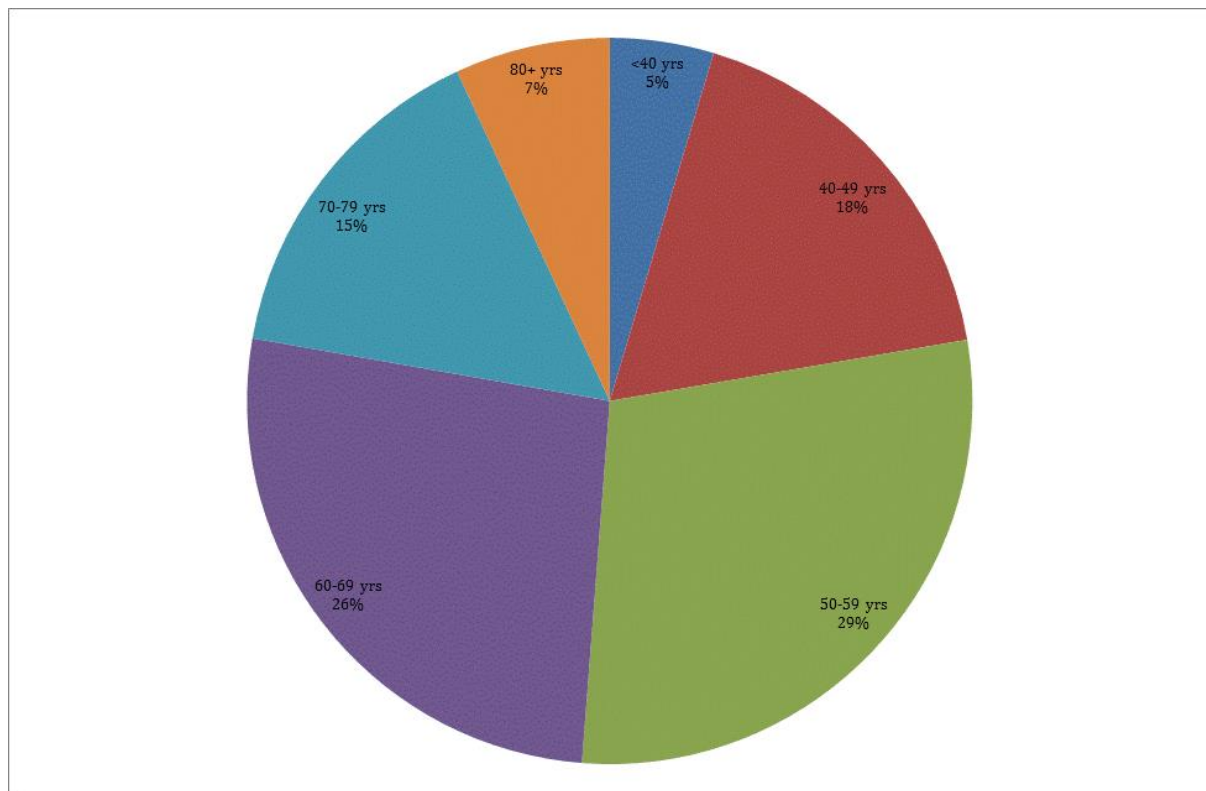


Figure 16. Age profile of forest owners in receipt of annual afforestation premium in 2013.

3.4.6 Private (other) ownership details

Previous sub-sections in this chapter have outlined ownership profiles of the private grant-aided estate. Information on ownership in the Private (other) component of the forest estate is not available, which comprised 89,350 ha in 2012 (NFI). The 1973 Inventory of Private Woodlands¹⁷ provided inventory information for forest areas of 40 ha or more (17,481 ha) or 21% of the total of 81,958 ha of private forests estimated at the time. At the time areas 40 ha or more and under single ownership represented the more commercially viable forest stands in private ownership. The remaining Private (other) forest is comprised of primarily juvenile, short-living, naturally regenerated broadleaf species such as birch. These forest areas are commonly quite small and frequently of limited use for agriculture due to slope and other restrictions. The number of owners in this category is in the region of 20-30,000. In 1973 over 40% of the 81,958 ha was comprised of “scrub” category. The size category of the 151 estates with detailed historical inventory information is shown in Table 10.

Table 10. 1973 Inventory of Private Forest - size categories.

Estate Forest Area (ha)	Number of estates	Area (%)
40-50	25	7
51-100	67	24
101-500	56	59
501-1,000	3	11

¹⁷ Purcell, T. 1979. Inventory of Private Woodlands, 1973, Department of Fisheries and Forestry, Forest and Wildlife Service.

3.5 Grant aided forest removal

The area of private grant aided forest taken out of afforestation between 2007 and 2014 is shown in Table 11, and account for 1-4% of the annual afforestation rate over the same years.

Table 11. Lands taken out of afforestation 2007-2014.

Year	Number	Area (ha)
2007	47	67
2008	101	209
2009	110	147
2010	74	99
2011	68	87
2012	75	91
2013	63	70
2014	52	64

3.6 Change of applicant

A substantial area of private grant-aided forests change ownership each year (Table 12). Most ownership change is within families from one generation to the next.

Table 12. Change of ownership by area of forest 2007-2014.

Year	Number	Area (ha)
2007	345	3,385
2008	348	3,309
2009	374	3,850
2010	393	3,612
2011	335	2,970
2012	402	3,999
2013	379	3,440
2014	376	3,679

4. Forest Management Operations

4.1 *Introduction*

This chapter provides information on forest roads, felling activity, reforestation and forest certification as follows:

- Public forest road construction trends 1944-2014;
- Private forest road building between 2007 and 2014;
- Felling licenses issued annually by the Forest Service between 2010 and 2014;
- Clearfell levels in state forests between 1933 and 2014;
- Private sector broadleaf tending and thinning between 2009 and 2014;
- The level of annual state reforestation between 1933 and 2014;
- The certified forest area.

Key findings

- Since 1944, 132 km of forest roads have been built annually in Public forests;
- Between 2007 and 2014 88 km of private grant-aided forest roads were built annually;
- Over 6,000 ha were reforested on public lands in 2014;
- The total certified forest area in Ireland is 401,986 ha, or 55% of the forest area;
- Public forest clearfell peaked between 2001 and 2007, coinciding with a peak in domestic construction activity;
- Between 2007 and 2010 state roundwood production, mainly Coillte, accounted for 82% of the national roundwood harvest.

4.2 Forest Roads

Forest roads enhance the economic viability of forests primarily by improving access for harvesting. In addition, forest roads also provide roundwood stacking, drying and chipping areas. Apart from economic enhancement, forest roads also improve the environmental and biodiversity value of forests by increasing edge effects, improve access to deal with fire and allow for better health and safety by providing access for emergency vehicles.

4.2.1 Public forest roading

Since 1944, 9,318 km of forest roads have been built annually in the public forest estate or on average 132 km annually (Figure 17).

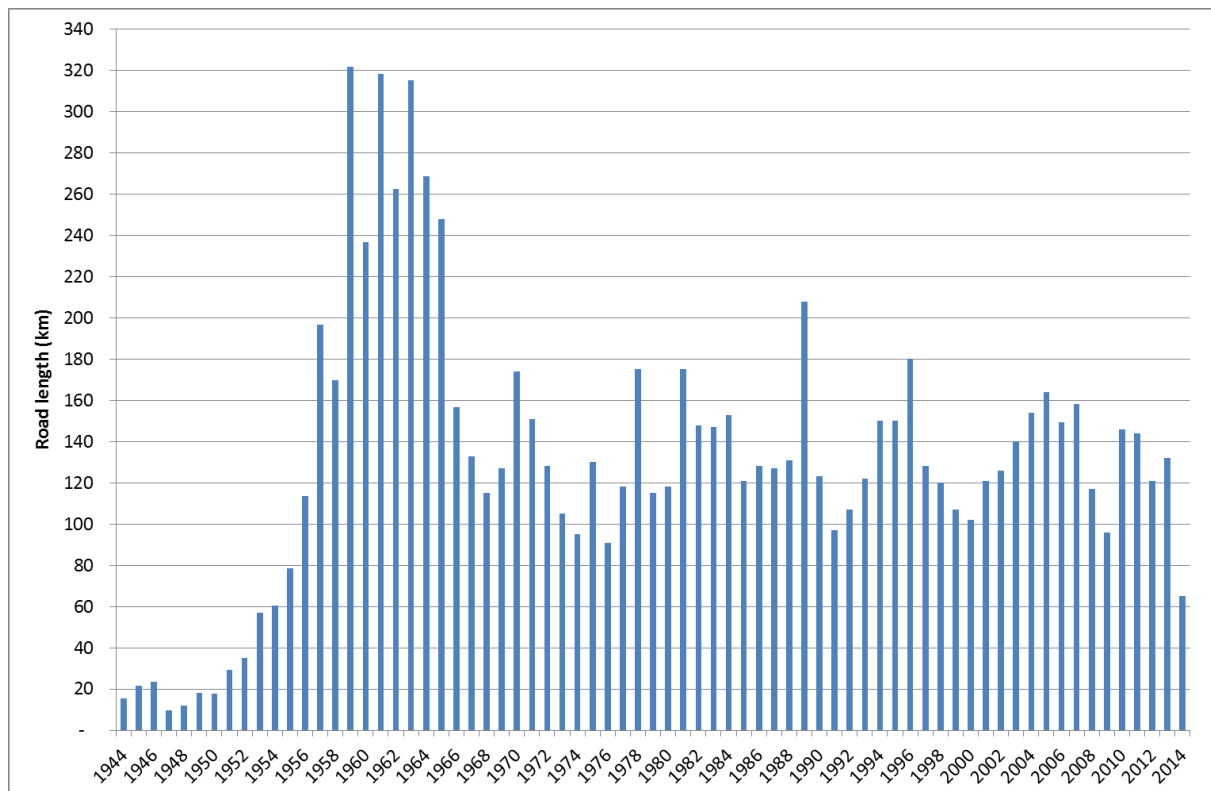


Figure 17. Forest road construction in public forests 1944–2014.

4.2.2 Private forest grant-aided roading

Up to 2007, due to the age profile of forests, forest roads were built primarily in public forests; however with the maturation of private sector forests, roads are increasingly required in private forests (Figure 18).

Since 2006, IFORIS¹⁸ has been used to record the number and length of forest roads grant aided. As the private estate reaches harvesting stage there has been an increase in the length of forest road built. Between 2006 and 2014, on average 88 km of private grant-aided forest roads were built annually.

¹⁸ IFORIS is an Integrated Forest Information System which was developed for the Forest Service for the processing of forestry pre-approval, grant and premium applications.

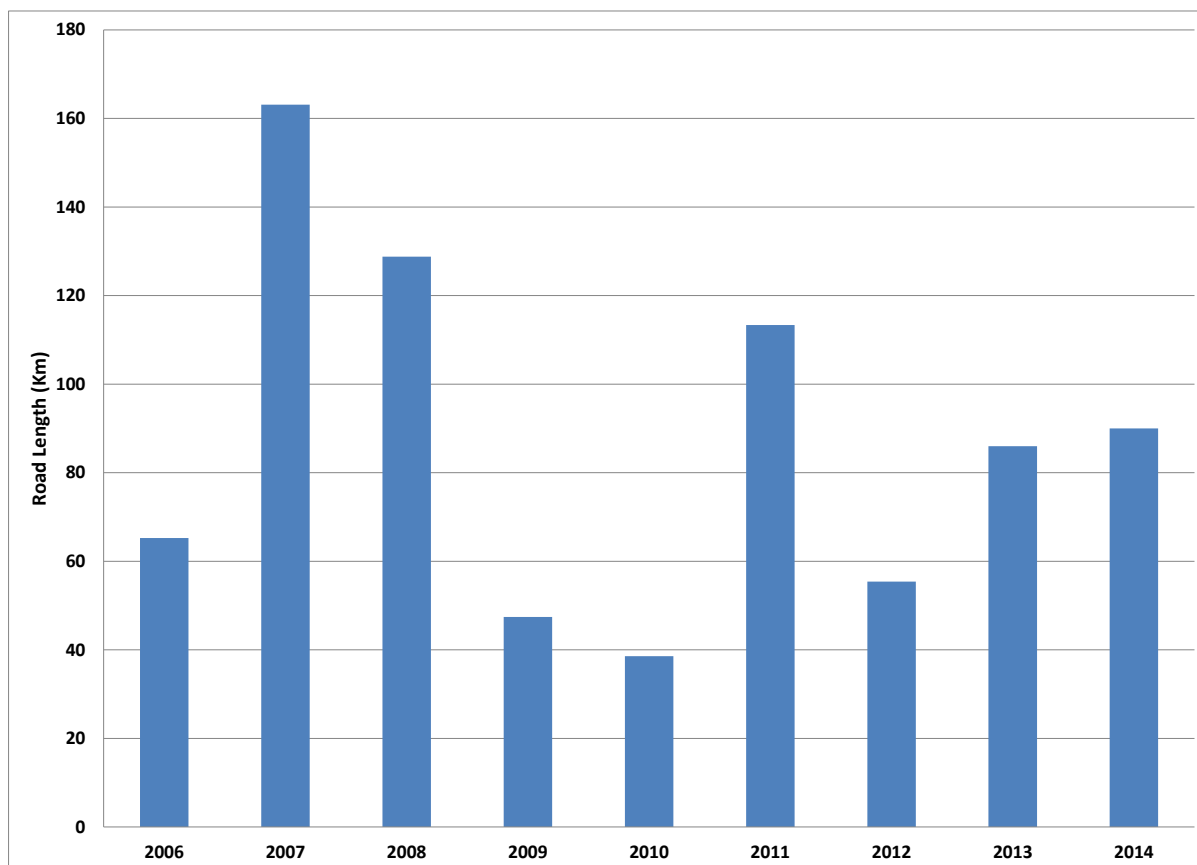


Figure 18. Private grant-aided forest road building 2007 to 2014.

4.3 Private forest estate felling activity

Approval for the felling of trees in Ireland is licensed by the Forest Service. Landowners are required under the 1946 Forestry Act to give notice of intention to fell trees.

Table 13 shows the area of lands granted felling licences for both thinning and clearfelling in privately-owned forests between 2010 and 2014. The area issued with felling licences for thinning has been on an upward trend since 2010, with a 66% increase since that year. A massive increase in clearfelling licenses was issued in 2014 in response to Storm Darwin with 3,447ha of licences for same issued.

Table 13. Area of felling licences issued for private forests, 2010-2014.

Year	Thinning area (ha)	Clearfell area (ha)
2010	10,382	439
2011	12,275	590
2012	13,037	467
2013	15,150	395
2014	15,742	3,447

4.4 Public forest thinning and clearfelling

The area of public forest clearfelled peaked in 2003, coinciding with a peak in domestic construction activity (Figure 19). Thinning activity in the public estate is shown in Figure 20.

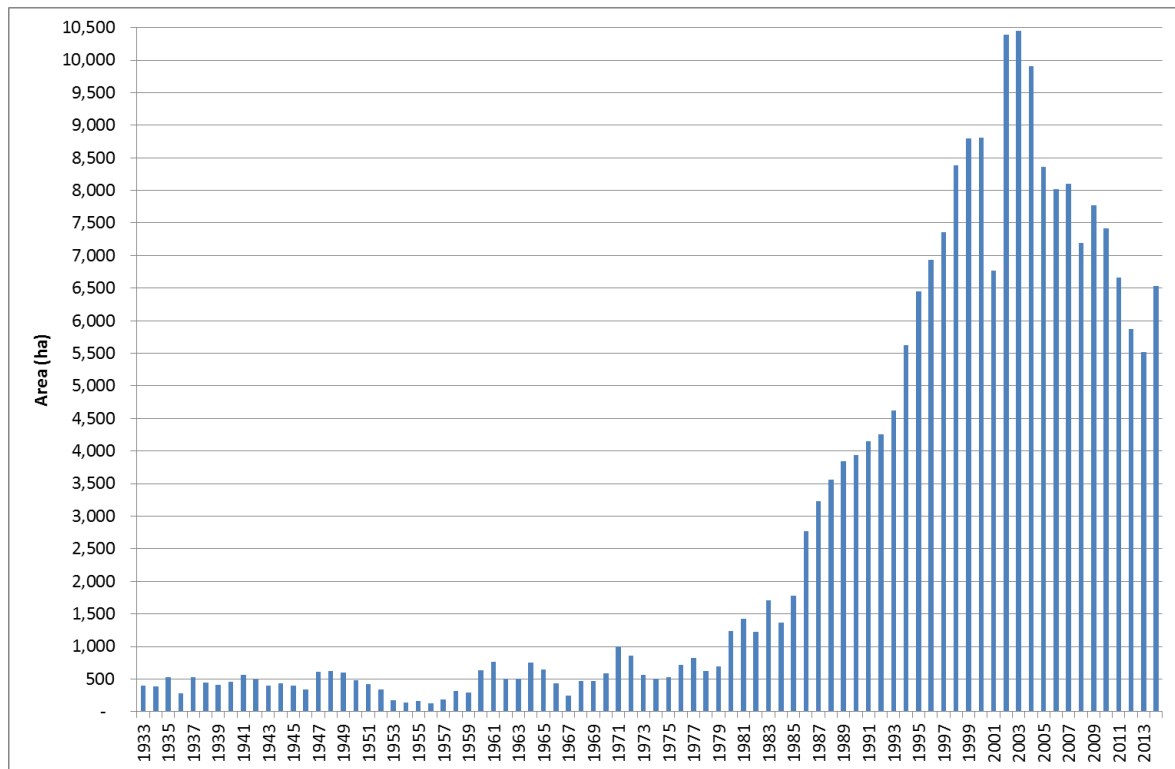


Figure 19. State forest clearfelling 1933-2014¹⁹

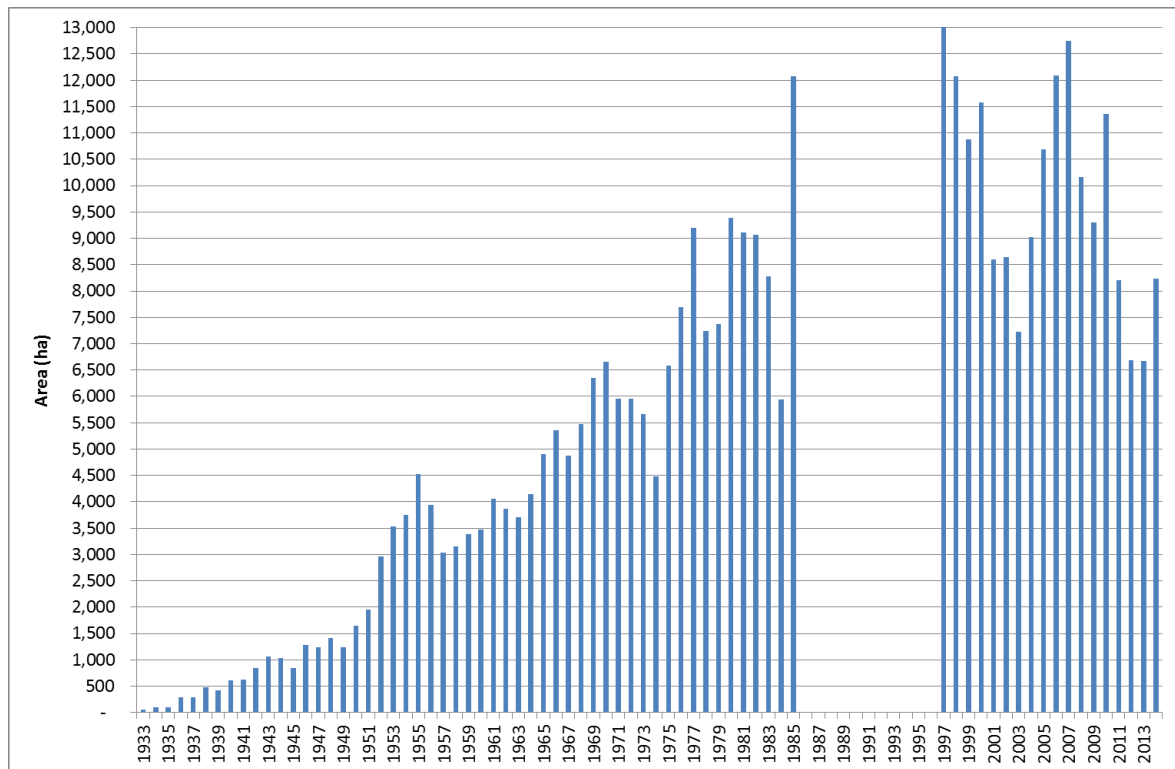


Figure 20. State forest thinning 1933-2014²⁰

¹⁹ Clearfell areas from 1986-2000 were estimated by averaging the reforestation areas for the two years following clearfell.

4.5 Public forest reforestation

Reforestation is the regeneration of existing areas of forests that have been felled. It is a condition of most felling licences that the felled forest is reforested, annual reforestation rates are mainly driven by harvesting levels (with a time lag, usually of around 2 years, between harvesting and reforestation).

Public forest reforestation rates from 1933 to 2014 are shown in Figure 21. Up until the early 80s, reforestation rates were low due to relatively low afforestation up to 1950. In the 50s and 60s afforestation greatly expanded, which is in turn was reflected in the increasing reforestation of the 80s and 90s. The area of public reforestation has fallen by about a third, since a peak of 10,000 ha in 2003. The years 2008 and 2009 show a significant decrease in reforestation as a result of a sharp decrease in harvesting for the same period, as a result of a downturn in the domestic construction sector.

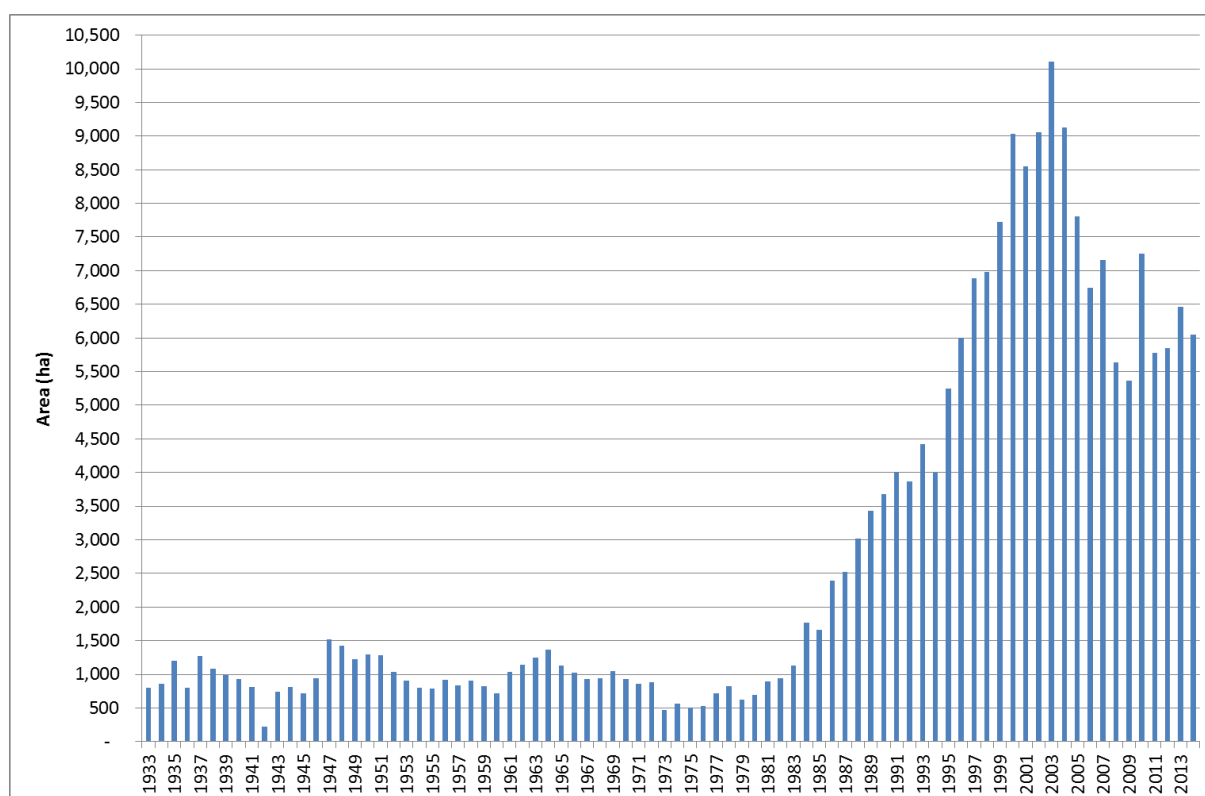


Figure 21. Public sector reforestation 1933 to 2014.

²⁰ Thinning data for 1986-1996 are currently not available.

4.6 Private Broadleaf Thinning and Tending

As part of the Forest Improvement Scheme (FIS) grants have been available for the tending and thinning of broadleaves. The objectives of the scheme are:

- Improvement felling of malformed or over-mature trees;
- Felling of additional trees to release potential final crop trees;
- Pruning to improve stem quality;
- Thinning or re-spacing to promote growth;
- Management and re-spacing of natural regeneration.

Grant aid for the treated area is available for either tending or thinning operations, depending on which are the most appropriate to the site (i.e. it is not necessary to carry out both sets of operations for grant aid). The tending and thinning element of the FIS was introduced in 2009. In total 4,760 ha has been tended or thinned up to the end of 2014 (Figure 14). Ash has been the main species grant aided. Table 15 shows the species areas grant aided.

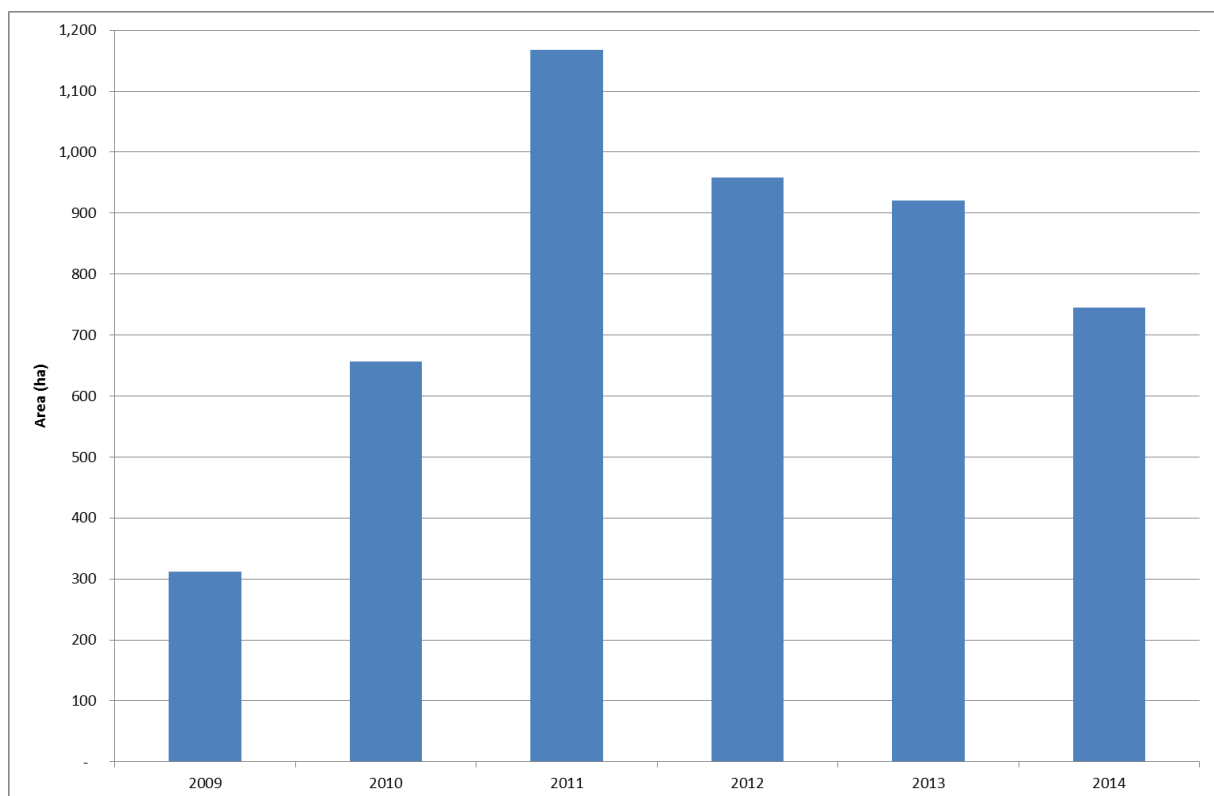


Figure 14. Areas tended and thinned between 2009 and 2014 under the Forest Improvement Scheme

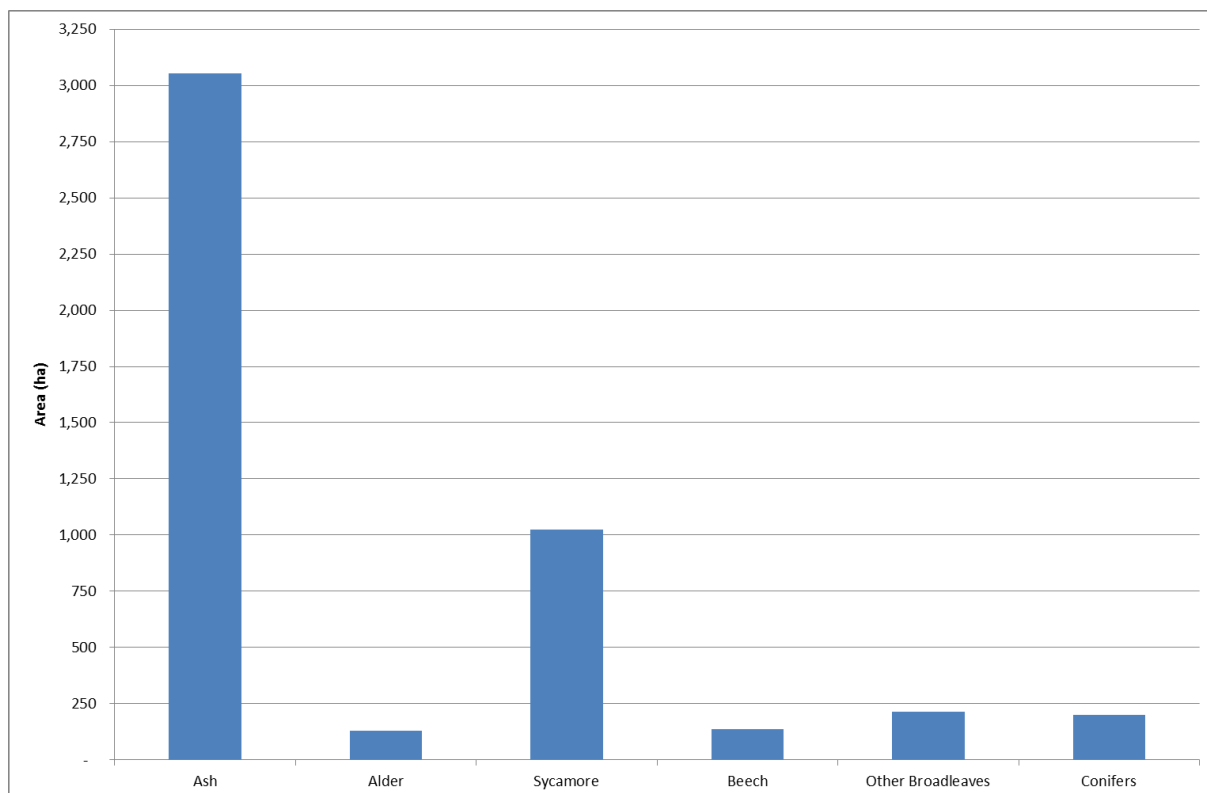


Table15. Species tended/thinned under the Forest Improvement Scheme, 2009-2014.

4.7 Certification

Voluntary forest certification schemes are run by international non-governmental organisations to promote good forest practice. In Ireland, there are currently two certifying bodies: the Programme for the Endorsement of Forest Certification (PEFC) and the Forest Stewardship Council (FSC). Voluntary forest certification links the demand for forest products to environmental and social standards to producers who to show that wood or wood products come from certified forests. All major Irish sawmills are certified.

The Forest Stewardship Council has certified the management of the Coillte estate which comprises 54% of the national forest estate. Certification has mainly been an issue for public forests up to now. However as the private sector harvest increases, certification is likely to be an issue for private forest owners in the near future. Currently about 6,500 ha of private forest is certified.

5. Forest Production and Carbon

5.1 Introduction

This chapter provides information on:

- The annual roundwood harvest between 1955 and 2014;
- The roundwood available for processing, 2006-2014;
- The roundwood forecast 2014-2028;
- Roundwood timber prices for both Coillte and the Private sector;
- Timber and paper products trade;
- Firewood production;
- Forest based biomass usage;
- The role of forests in climate change mitigation;
- Ireland's Kyoto obligation and its fulfilment;
- Irish forest carbon stocks.

Key statistics

- The total roundwood harvest in 2014 (Including firewood) was 3.11 million cubic metres, the highest level since records began;
- Softwood available for processing in 2014 was 2.96 million m³.
- Eighty one per cent of the roundwood available for processing came from Coillte in 2014, with the balance mainly coming from the private sector;
- The total forecast of net realisable volume production for the island of Ireland over the forecast period, 2014-2028, is estimated as being 65.7 million m³ overbark with an additional 1.9 million m³ potentially available in the tip - 7cm category;
- The average Coillte timber price in 2014 was nominally up 15% over 2013 and continued a largely upwards trend overall in timber prices since 2009;
- In value terms Ireland was exporting 126% more sawn timber in 2014 than in 2008, mainly to the UK;
- In 2014, 36% of the roundwood harvested in the Republic of Ireland was used for energy generation, mainly within the forest products sector;
- In 2014, 52% of the Irish market for sawn softwood timber was supplied by domestic production with the balance being imported;
- The usage of Irish roundwood for wood energy accounted for over one third of the harvest in 2014 and mitigated over half a million tonnes of CO₂ emissions;
- The national forest estate is an important carbon reservoir, amounting to 381 million tonnes of carbon in 2012; an increase from 348 million tonnes in 2006;
- Article 3.3 forests represented a net removal of 16 Mt of CO₂ eq. from the atmosphere between 2008 and 2012, offsetting ca. 5% of all national emissions.

5.2 Roundwood

5.2.1 Roundwood Harvest 1955-2014

The national roundwood harvest (excluding firewood & hardwood) from Irish forests between 1955 and 2014 is shown in Figure 22. No data are available for the private roundwood harvest prior to 2006, however it was estimated that 100,000 m³ was harvested from the private forest estate in 2000²¹.

Up until the early eighties roundwood harvest was low, due to relatively low afforestation rates up to 1950. The early 80s saw the opening of the Finsa and Medite board mills which drove up demand for roundwood and sawmilling residues. In 2014, 3.11 million m³ of roundwood was harvested in the Republic of Ireland, the highest level since records began.

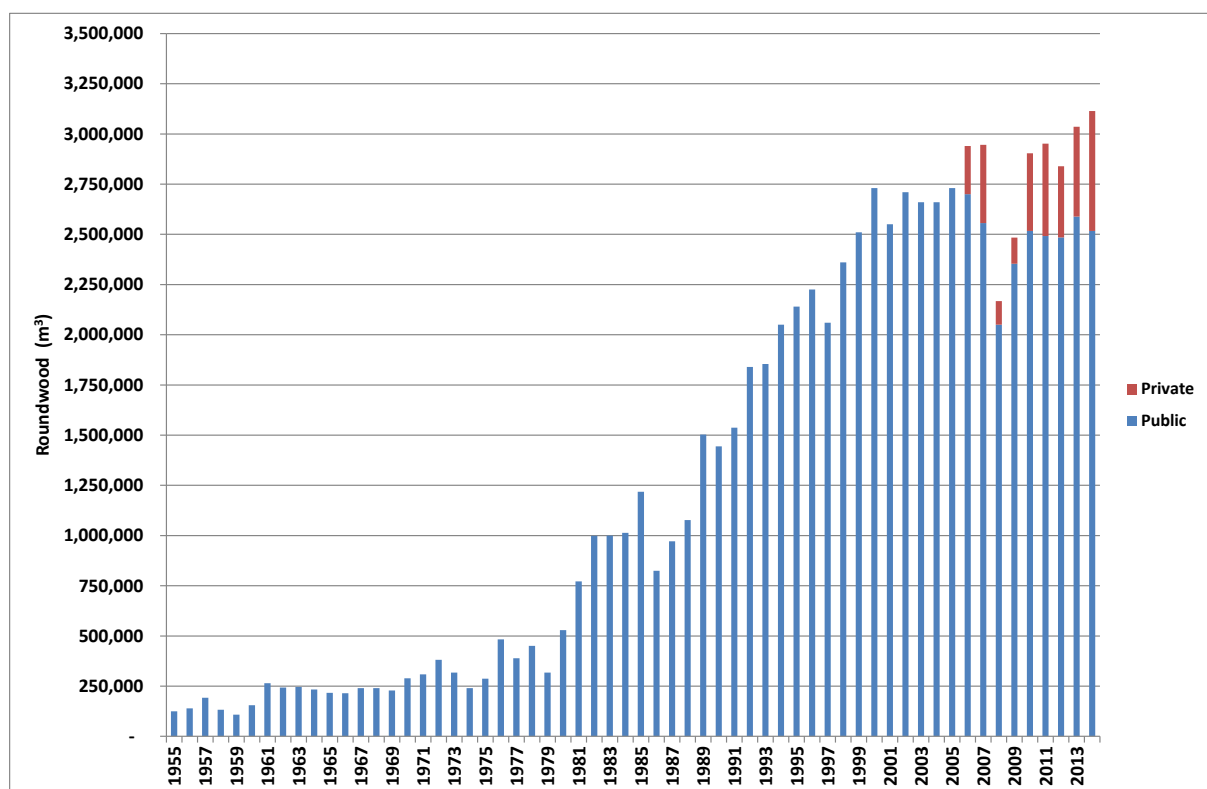


Figure 22. Roundwood harvest 1955-2014.

²¹ Gallagher, G. and O'Carroll, J. 2001 *Forecast of Roundwood Production from the Forests of Ireland 2001-2015*. COFORD, Dublin.

5.2.2 Roundwood available for processing 2006-2014

The annual national roundwood available for wood processing, excluding firewood and hardwood, is shown in Table 16. The sharp downturn in roundwood available for processing in 2008 and 2009 reflected the downturn in the domestic construction sector. At this time domestic sawmills were also seeking to increase their share in export markets. In 2014, 2.95 million cubic metres of roundwood were available for processing in the Republic of Ireland, a 3% increase on 2013 production (Table 16). Between 2006 and 2014 roundwood production from privately owned forests averaged just over 316,000 m³. In 2014, 447,000m³ of roundwood came from privately owned forests, up 27% from 2013.

Table 16. Roundwood available (Commercial softwood) for processing in the Republic of Ireland 2006-2014.

Year	Log imports less exports	Coillte Output	Private output	Total Roundwood	Sawlog	Pulp	Stake
2006	214,000	2,700,000	240,000	3,154,000	2,176,000	820,000	158,000
2007	57,000	2,556,000	390,000	3,003,000	1,934,000	889,000	180,000
2008	104,000	2,050,000	118,000	2,272,000	1,455,000	761,000	56,000
2009	-63,000	2,354,000	130,000	2,421,000	1,602,000	731,000	88,000
2010	28,000	2,217,000	463,000	2,708,000	1,603,000	987,000	118,000
2011	55,000	2,299,000	386,000	2,740,000	1,580,000	1,044,000	116,000
2012	-18,000	2,269,000	343,000	2,594,000	1,622,000	841,000	131,000
2013	49,000	2,474,000	328,000	2,851,000	1,710,000	1,024,000	117,000
2014	68,000	2,434,000	447,000	2,949,000	1,815,000	987,000	147,000

In recent years the private sector has begun to make a substantial contribution to the annual harvest. This reflects the greater area of private forests reaching first thinning stage, much of which was planted in the early 1990s, and increased export market share gained by sawmills. Commercial hardwoods are still a very minor element of the annual roundwood available for processing; just 6000m³ of commercial hardwoods came on the market in 2014 (Table 17).

Table 17. Roundwood available (Commercial hardwood) for processing in the Republic of Ireland 2010-2014.

	2010	2011	2012	2013	2014
	000 m ³ OB				
Imports less exports	0	0	0	-1	0
Coillte	0	1	1	2	6
Private Sector	0	1	1	1	0

In 2014, 36% of the roundwood harvested in the Republic of Ireland was used for energy generation, mainly within the forest products sector. Demand for sawn timber grew by 9% in 2014, driven by an improving construction market. In terms of self-sufficiency, 52% of the Irish market for sawn softwood timber was supplied by domestic production with the balance being imported. Over the same period, only 6% of the Irish market for sawn hardwood was supplied domestically.²²

²² Woodflow and forest-based biomass energy use on the island of Ireland (2014). COFORD, Dublin.

5.2.3 Roundwood Forecast

The total forecast of net realisable volume production for the island of Ireland over the forecast period, 2014-2028, is estimated as being 65.7 million m³ overbark with an additional 1.9 million m³ potentially available in the tip - 7cm category.

Table 17 displays the future sustainable harvest levels between 2014 and 2028 by assortment and ownership type. The potential harvest will increase from 3.4 million m³ to 6.7 million m³ over this period (Table 17). Privately owned forests will steadily increase their share of the total harvest of roundwood from 12.7% in 2014 to 50.3% in 2028.²³

Table 17. Forecast of potential conifer net realisable volume production by assortment category and ownership type 2014 -2028, (000 m³ overbark).

Year	Private					Coillte					Overall Total
	Tip - 7cm	7- 13cm	14- 19cm	20+cm	Total	Tip - 7cm	7 - 13cm	14- 19cm	20+ cm	Total	
2014	41	229	150	45	466	58	543	871	1,492	2,964	3,429
2015	47	264	183	57	551	57	598	844	1,402	2,900	3,452
2016	52	297	196	72	617	55	583	859	1,293	2,789	3,406
2017	64	377	284	91	816	54	580	826	1,316	2,777	3,593
2018	56	317	191	122	686	55	592	828	1,346	2,822	3,508
2019	65	366	290	195	917	56	584	864	1,362	2,866	3,783
2020	78	492	486	262	1,319	57	616	865	1,362	2,899	4,217
2021	85	485	555	463	1,589	57	585	833	1,411	2,886	4,475
2022	84	483	528	404	1,500	57	546	816	1,502	2,921	4,421
2023	93	502	784	848	2,228	58	516	817	1,551	2,941	5,169
2024	84	490	657	617	1,848	58	507	800	1,595	2,960	4,808
2025	72	427	634	703	1,836	57	478	789	1,598	2,922	4,758
2026	76	441	715	886	2,118	54	444	756	1,985	3,238	5,356
2027	101	544	1,209	1,605	3,458	54	444	756	1,985	3,238	6,696
2028	96	519	1,090	1,620	3,325	54	444	756	1,985	3,238	6,563
Total	1,095	6,234	7,953	7,991	23,273	841	8,059	12,277	23,184	44,361	67,634

A new roundwood forecast for the years 2016-2035 will be published in 2016.

²³ Philips, P. 2011. *All Ireland Roundwood Production Forecast 2011-2028*. COFORD, Dublin.

5.2.4 Roundwood Prices- Coillte

Coillte is the dominant supplier of logs to the processing sector in Ireland. The standing timber price is the price paid per cubic metre of timber by the purchaser, where the purchaser is responsible for harvesting. The figures quoted in table 18 below are for sales to the sawmill sector only and include all species and harvest types. Since the mix of species and harvest types can vary from quarter to quarter, this impacts on contracted prices in addition to the impact of other market factors. The majority of prices quoted are for standing sales with retained pulpwood, i.e. there is no value for pulp included in these prices. Coillte retain the pulpwood to supply their boardmills i.e. Smartply and Medite. The average timber price in 2014 was nominally up 15% over 2013 and continued a largely upwards trend overall in Coillte timber prices since 2009.

Table 18. Average Standing Timber Prices (€) by category, Coillte 2004 – 2014.

Category (m ³)	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
0.001 - 0.074	-	8.91	4.11	10.04	-	-	-	-	10.5	-	-
0.075 - 0.124	5.5	7.8	6.67	9.37	-	3.96	-	-	-	-	-
0.125 - 0.174	11.91	9.45	12.22	8.64	19.38	4	-	8.5	9.5	-	-
0.175 - 0.224	14.58	12.4	17.15	19.43	24.14	15.04	38.64	32.75	-	-	-
0.225 - 0.274	20.78	17.28	18.07	34.41	21.43	19.01	47.59	39.53	40.92	48.73	48.54
0.275 - 0.324	24.89	22.27	26.44	37.98	28.86	19.9	43.8	42.26	43.17	47.09	52.17
0.325 - 0.374	23.98	22.64	22.11	43.43	30.37	23.2	44.06	43.73	44.46	51.32	51.81
0.375 - 0.424	25.12	24.56	24.58	41.24	33.78	24.48	58.17	44.37	46.84	48.64	56.16
0.425 - 0.474	28.69	26.17	34.42	43.72	31.45	24.03	55.54	47.16	45.57	51.99	57.73
0.475 - 0.499	36.05	25.89	34.31	47.91	35.69	25.12	55.07	45.95	48.47	54.54	57.83
0.500 - 0.599	32.52	31.71	32.52	50.46	37.76	26.82	59.91	48.25	50.46	51.59	57.94
0.600 - 0.699	36.92	35.1	36.3	52	38.41	27.07	63.67	48.99	52.9	55.39	66.38
0.700 - 0.799	38.59	37.89	39.42	52.09	39.04	26.97	58.75	49.92	54.12	55.60	63.43
0.800 - 0.899	41.23	38.71	41.19	50.64	42.06	27.34	57.11	50.65	52.79	57.41	69.10
0.900 - 0.999	40.45	40.48	37.88	53.59	41.44	28.86	56	51.25	53.95	60.68	64.26
1.000 +	43.7	38.53	45.11	55.62	39.59	29.35	59.55	51.31	53.77	54.00	66.73
Average (€/m³)	32.25	30.00	30.94	47.21	35.29	25.74	56.67	47.84	49.97	53.56	63.15

Source: Coillte Sales and Marketing as presented by Teagasc²⁴

²⁴ http://www.teagasc.ie/forestry/advice/timber_prices.asp#Timber_prices_supplied_by_Coillte

5.2.5 Roundwood Prices- Private Sector

The number of timber sales and the size of timber sales lots from private sales are relatively small compared to Coillte and as a result, Coillte's price information is more robust than any information on sales in the private sector²⁵. Prices presented in Table 19 below are therefore for guidance purposes only. The UCD Forestry Section and the Irish Timber Growers Association (ITGA) collate timber price information from private sources. Private timber prices follow a nominal upwards trend in prices since 2005, although this trend estimation is less reliable due to the small sample size. The prices presented in Table 19 include pulpwood prices from the private sector.

Table 19. Roundwood prices received by Private Growers by average tree size category 2005 – 2014. (* denotes small number of sales)

Category (m ³)	2005	2006	2007	2009	2010	2011	2012	2013	2014
0.001 - 0.074	5.98	3.98	6.00	8.28	10.50	10.60	10.20	9.44	14.04
0.075 - 0.124	6.80	6.54	10.51	7.15	14.40	14.30	14.30	12.80	13.53
0.125 - 0.174	10.12	10.31	12.76	7.26	17.40	13.50	19.20	18.96	18.40
0.175 - 0.224	14.83	16.06	17.80	11.59	22.90	15.80	17.80	20.44	28.72
0.225 - 0.274	14.96	15.16	37.82	11.29	35.30	23.10	25.10	18.62	33.14
0.275 - 0.324	21.77	24.82	27.47	11.64	47.10	36.90	32.90	21.84	34.06
0.325 - 0.374	26.49	21.54	49.65	14.50	64.10	57.50	38.60	47.42*	39.64
0.375 - 0.424	24.26	23.73	33.06	16.00	56.70	52.30	28.40	44.48	49.03
0.425 - 0.474	25.33	43.17	43.80	50.00	54.20	53.30	48.30	32.00*	65.93
0.475 - 0.499	-	-	52.00	-	53.00	35.00	-		
0.500 - 0.599	37.77	38.43	53.09	-	57.10	50.30	49.20	45.05	61.85
0.600 - 0.699	35.80	43.37	41.68	-	54.30	51.70	51.80	45.99	56.82
0.700 - 0.799	44.51	44.80	52.57	-	54.30	52.60	54.70	53.79	64.21
0.800 - 0.899	46.93	45.06	57.20	-	53.70	50.40	54.90	53.35	67.72
0.900 - 0.999	46.82	45.00	50.51	-	52.90	53.40	54.80	51.26	65.16
1.000 and over	44.47	45.27	56.32	-	56.90	45.00	54.20	52.97	60.38

Source: UCD Forestry Section and the Irish Timber Growers. Presented in Forestry & Timber Yearbook 2014.

²⁵ Forestry Economic Review 2012/2013. Teagasc, 2013.

5.2.6 Forest-based biomass

Forests also provide a source of renewable raw materials for fuel and wood products which help mitigate rises in greenhouse gases. Usage of wood fuels is increasing due to renewable energy policies and as young plantations enter the production stage.

In 2014, 36% of roundwood harvested was used for energy generation, mainly within the forest products sector (Table 20). The usage of roundwood for wood energy mitigated 0.6 million tonnes of CO₂ emissions in 2014. Between 2010 and 2014 the use of wood biomass energy has resulted in an estimated greenhouse gas (GHG) emission saving of 2.74 million tonnes of CO₂.²⁶

Table 20. Use of forest-based biomass and as a proportion of total roundwood harvest (2010-2014).²⁷

	2010	2011	2012	2013	2014
	000 m ³ OB RWE				
Wood-biomass use by the energy ²⁸ and forest products industry	554	572	611	660	760
Roundwood chipped for primary energy use	39	41	30	100	100
Domestic firewood use	199	214	225	230	235
Short rotation coppice	1	5	5	5	5
Wood pellets and briquettes	121	129	144	161	150
Charcoal	2	5	2	1	1
Total	916	966	1,017	1,157	1,251
Roundwood harvest					
Roundwood available for processing	2,708	2,740	2,594	2,852	2,975
Firewood harvest	199	214	225	230	235
Total	2,907	2,954	2,819	3,082	3,210
Forest-based biomass as a % of total roundwood harvest	31.5	32.6	36.0	33.5	36.3

²⁶ Woodflow and forest-based biomass energy use on the island of Ireland (2014). COFORD, Dublin.

²⁷ Woodflow and forest-based biomass energy use on the island of Ireland (2013). COFORD, Dublin.

²⁸ This includes co-firing of wood-biomass at Edenderry Power; www.edenderrypower.ie

5.3 Firewood production

Statistics on the sale of firewood from public forests between 1937 and 1987 are shown in Figure 23. Firewood consumption peaked during the Second World War due to restricted coal imports. There was also increasing firewood demand during the eighties, reflected in increased sales in this decade. Official estimates of firewood use are unavailable between the years 1988 and 2005.

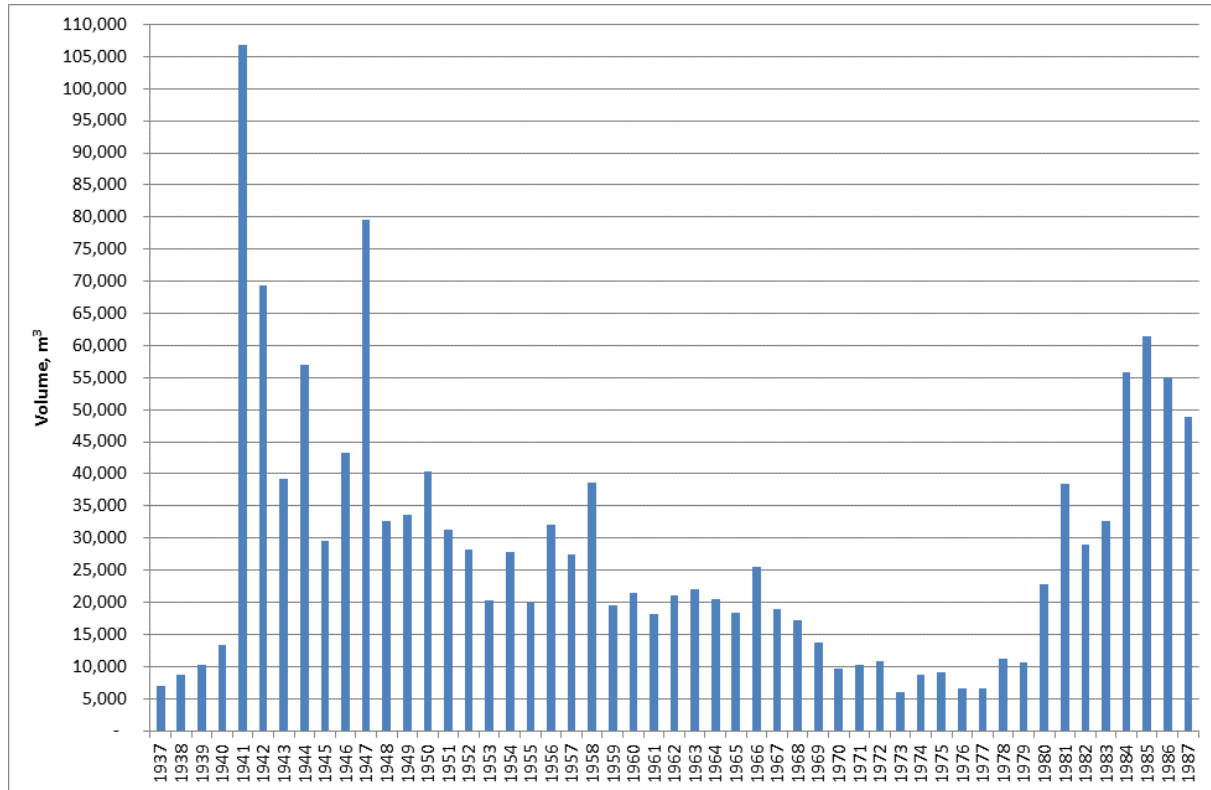


Figure 23. Firewood production volume from public forests 1937-1987.

Residential energy use grew by 26% (1.1% per annum) over the period 1990–2011. Corrected for climate the growth was 19%. During this time the number of households in the State increased by 64%, from approximately 1.0 million to 1.65 million. Since 1990, there has also been a decrease in the use of firewood in open fires, in line with the general decline of solid-fuel open fires, with a concurrent rise in the use of oil, gas and electricity for residential energy consumption. As a result the share of firewood used for domestic heating has decreased since 1990²⁹. However with the significant increase in the number of households and energy usage per household there has been a concurrent significant increase in firewood sales since the eighties. In recent years there has also been a large increase in the number of stoves used domestically, with a 35% increase in stove sales noted for 2011 from 2010³⁰.

Firewood use in Ireland between 2006 and 2014 from state and private forests, including wood sourced from non-forest areas, is shown in Figure 24. The firewood market in Ireland has grown by 60% from 147,000m³ in 2006 to 235,000m³ in 2014. First-thinning of broadleaf forests also qualify for grant aid since 2009. This measure has resulted in substantial mobilisation of firewood from first thinnings, principally for domestic use. In addition, firewood is also harvested by forest owners for their own use and firewood³¹. In 2014, 66% of home produced

²⁹ *Energy in Ireland 1990 – 2011*. Sustainable Energy Authority of Ireland Report 2012

³⁰ *Situation and Outlook for Forestry 2011/2012*. Teagasc 2012

³¹ *Woodflow and forest-based biomass energy use on the island of Ireland (2012)*. Coford

firewood came from private lands while 34% came from state forests. Ireland is now consuming more firewood than at any other time in the state's history.

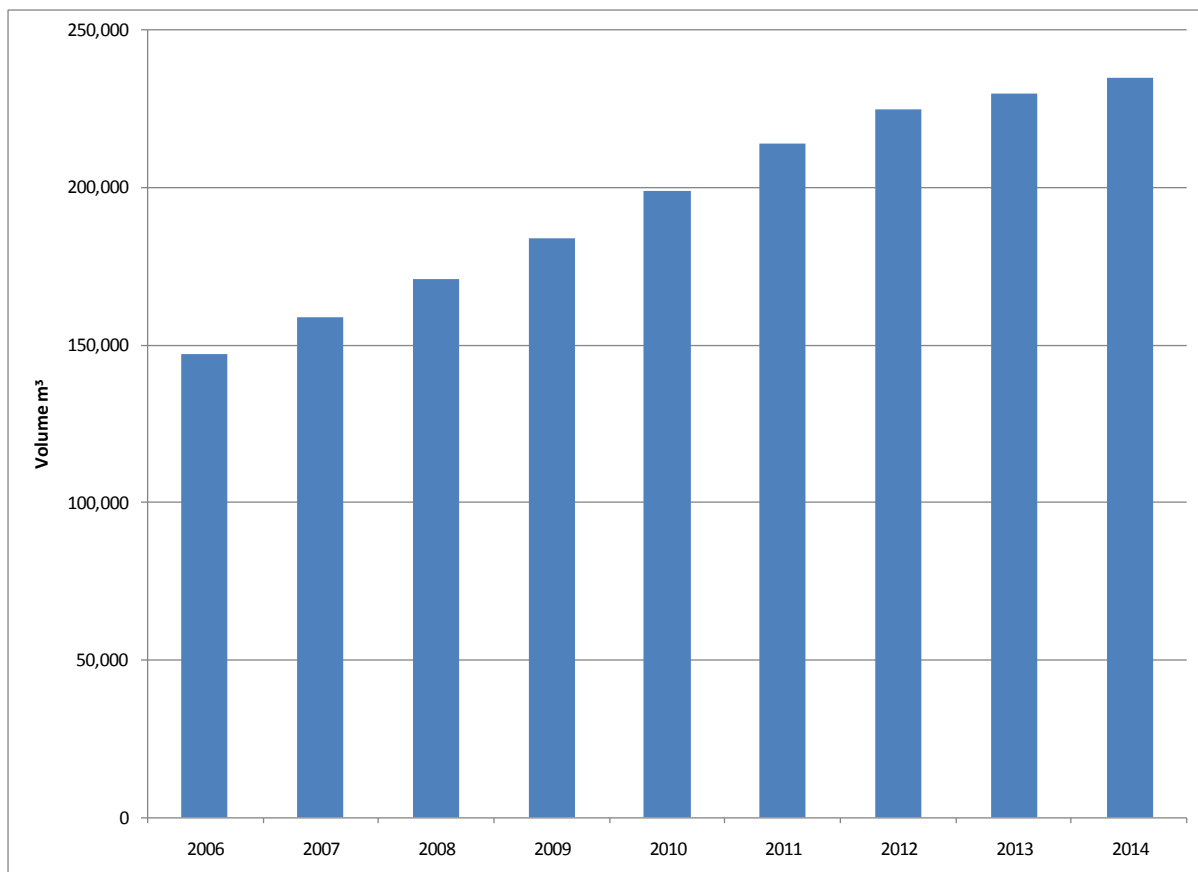


Figure 24. The domestic firewood market 2006-2014. Source: Woodflow and forest-based biomass energy use on the island of Ireland (2014). COFORD, Dublin.

5.4 Timber and paper products trade

In 2014, exports of forest products from the Republic of Ireland were valued at €370 million, a 9% increase on 2013. Wood-based panels accounted for nearly 54% of the value of forest products exports, the balance comprising paper and sawn timber exports (Table 21). In value terms Ireland became a net exporter of sawn timber in 2010, the first time since 1961, when forest products statistics began to be compiled by the FAO. This came about due to the closing of the gap between the value of exports and imports from 2008 onwards due to the collapse of the domestic construction market and greatly increased exports of sawn timber. In value terms Ireland was exporting 126% more sawn timber in 2014 than in 2008, mainly to the UK.

Table 21. Timber and paper products trade, volume and value (2008-2013)³²

	Imports													
	2008	2009	2010	2011	2012	2013	2014	2008	2009	2010	2011	2012	2013	2014
	000 m ³							€ million						
Sawn Timber	412	232	242	201	145	134	205	141	66	74	64	54	51	74
Wood-based panels	264	181	166	195	204	194	235	108	68	65	68	75	78	98
	000 tonnes													
Pulp products	29	32	41	54	47	50	46	20	22	31	45	45	41	42
Paper & particle-board products	526	379	370	383	415	428	404	520	308	313	333	339	340	340
TOTAL								789	464	483	510	513	510	554
	Exports													
	2008	2009	2010	2011	2012	2013	2014	2008	2009	2010	2011	2012	2013	2014
	000 m ³							€ million						
Sawn timber	389	564	658	619	534	601		54	51	85	83	73	81	122
Wood-based panels	614	580	660	616	630	665		195	147	179	173	179	199	198
	000 tonnes													
Pulp products	2		1											
Paper and particle-board products	77	45	33	59	68	81		69	45	44	52	51	59	50
TOTAL								318	243	308	308	303	339	370

³² Includes import/export figures for sawn timber, wood based panels and pulp/paper products only. Data taken from Ireland's Joint Forest Sector Questionnaire (JFSQ) returns (2009-2014). Roundwood, sawmill residues and secondary processed timber products are not included. *Woodflow and forest-based biomass energy use on the island of Ireland* (2013). COFORD Connects No.34. COFORD, Dublin.

5.5 Carbon stocks

Forests and forest sector policies play an important role in mitigating climate change by:

- afforestation and reforestation;
- forest management;
- controlling deforestation (land use change from forest to non-forest);
- the use of wood products to store carbon and displace emissions from energy intensive materials;
- Use of forest products for bioenergy to replace fossil fuel use.

In 1997, Ireland committed to maintain national greenhouse gases emissions at 13% above 1990 levels, as part of a legally-binding commitment under the Kyoto Protocol. Over the five years of the first commitment period of the Kyoto Period (i.e. 2008 to 2012), Ireland met its Kyoto obligations when forest carbon stock changes associated with afforestation and deforestation activities since 1990 were taken into account. Article 3.3 forests represented a net removal of over 16 Mt of CO₂ eq. from the atmosphere between 2008 and 2012, offsetting ca. 5 % of all national emissions.

The national forest estate is an important carbon reservoir, amounting to 381 million tonnes of carbon in 2012 as estimated from the 2nd cycle NFI. Carbon in biomass, deadwood and litter pools have increased between 2006 and 2012 (Table 22).

The carbon stock in forest soils is the dominant component, accounting for 85.1% of the carbon in the forest estate in 2012. Total living tree biomass amounted to 12.7% of the total carbon stock, while deadwood, including logs, stumps and standing dead trees along with litter constituted the remaining 2.2%.

Table 22. Forest carbon stocks 2006 and 2012.

Carbon Stock	2006		2012	
	Million t	% Total	Million t	% Total
Above-ground biomass*	30.6	8.9	39.7	10.4
Below-ground biomass**	6.7	1.9	8.8	2.3
Deadwood***	1.2	0.4	2.5	0.6
Litter	2.3	0.7	6.3	1.6
Soil	304.9	88.1	323.7	85.1
Total	348.4	100.0	381.0	100.0

* Above-ground biomass includes all living stems, branches and needles/leaves based on a stump height at 1% of total tree height.

** Below-ground biomass includes all roots to a minimum diameter of 5 mm.

*** Deadwood includes all logs, stumps and branches with a minimum diameter of 7 cm.

6. The Socio-Economic Contribution of the Forest Sector

6.1 Introduction

This Chapter provides information on the socio-economic contribution of forestry in Ireland in the following areas:

- The value of direct economic activity in the growing/harvesting subsector (excluding wood processing and related activities) and employment for the years 2003 and 2012;
- The value of total (Direct, Indirect and Induced) economic activity in the growing/harvesting subsector and employment for the years 2003 and 2012.

Key statistics

- An approximation of the full economic value of the forest sector in 2012 is €2.3 billion, when both indirect and induced effects are taken into account;
- The total GVA of the Forest sector was €1,096.5m in 2012;
- The total value of economic activity in the Growing/Harvesting sector in 2012 was €387m;
- For every €1 of economic activity generated in the growing and Harvesting subsector a further €0.78 is generated in the wider economy in 2012;
- The total value of economic activity in the wood processing sector in 2012 was €1389.1m;
- For every €1 of economic activity in wood processing an extra €0.66 is generated in the wider economy in 2012;
- The number of people employed directly in the forestry and logging sector has averaged 2,600 between 1998 and 2012;
- In 2010 direct and induced employment supported by the forest sector was estimated to be 5,530 persons. While in the wood processing sector direct and induced employment was estimated to be 6,410 persons.
- The overall value of both the growing and harvesting sub-sector and wood processing subsector has grown by 46% and 39% respectively since 2003;
- The number of people employed directly in the wood-processing subsector has decreased since the economic downturn in 2008;
- Over 18,000,000 forest visits took place in 2005;
- In 2013, €108 million was spent on planting grants, maintenance grants, annual premium payments and grant aid for forest roads.

6.2 Value of the Forest Sector

The total value of economic activity of the forest sector, both directly of itself and to the wider Irish economy, is shown in Table 23. The total direct value of economic activity in the Growing/Harvesting sub-sector in 2012 was €387m. Value to overall Gross Domestic Product or Gross Value Added (GVA) was €136.6m. In terms of the multiplier effect of this economic activity, for every €1 generated in the Growing/Harvesting sub-sector a further €0.78 was generated in the wider economy in 2012. This resulted in the growing and harvesting sub sector contributing an overall value of €688.7m to the wider Irish economy, an increase of €216m since 2003.

The total value of economic activity in the wood processing sub-sector in 2012 was €1389.1m. It added €391.6m in terms of GVA to the economy. For every €1 of economic activity in wood processing an extra €0.66 was generated in the wider economy, an increase of €79.3m over the 2003 figure. Total extra activity in the wider economy in 2012 was €910.3m (€2,299.4 – 1,389.1 m), an increase of €235 m since 2003.

The total GVA of the Forest sector was €1,096.5m in 2012. An approximation of the full economic value of the forest sector in 2012 is €2.3 billion, when both indirect and induced effects are taken into account.³³

Table 23. Value of economic activity in the forestry sector.

Growing and Harvesting sub-sector		
	2003 ³⁴	2012 ³⁵
	Million, €	
Direct Economic Activity Value	255.4	386.9
Gross Value Added	134.5	136.6
Overall Value to Wider Irish Economy	472.4	688.7
Type 2 Multiplier	1.9	1.78
Wood processing sub-sector		
Direct Economic Activity Value	975.0	1389.1
Gross Value Added	312.3	391.6
Overall Value to Wider Irish Economy	1650.0	2299.4
Type 2 Multiplier		1.66

³³ *Annual Review and Outlook for Agriculture, Food and the Marine 2013/14*. Department of Agriculture, Food and the Marine.

³⁴ Ní Dhubháin, Á., Flechard, M., Moloney, R., O'Connor, D., Crowley, T., 2006. *The Socioeconomic Contribution of Forestry in Ireland – an Interdisciplinary Approach*. COFORD, Dublin.

³⁵ Personal Communication. Dr. Richard Moloney, 2014.

6.3 *Employment in the forest sector*

In 2010 direct and induced employment supported by the forest sector was estimated to be 5,531. While in the wood processing sector direct and induced employment was estimated 6,408³⁶.

In 2012 the total employment generated by activities in the forest and wood products sector was 12,000 full time equivalents³⁷.

6.3.1 **Categorisation of employment statistics**

There is an EU wide nomenclature for the classification of economic activity, which is referred to as NACE. The class '**Forestry and Logging**' is most relevant for the purpose of this publication and includes the following four components³⁸:

- Silviculture and other forestry activities;
- Logging;
- Gathering of wild growing non-wood products;
- Support services to forestry.

It is important to note that the Forestry and Logging class is concerned only with what occurs within the forest. Activities outside of the forest, such as transport of logs to a sawmill, are not included.

There is one other class which is relevant for this publication, '**Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials**'. This class can be broken into the following sub-categories:

- Sawmilling and planing of wood;
- Manufacture of products of wood, cork, straw and plaiting materials:
 - Manufacture of veneer sheets and wood-based panels;
 - Manufacture of assembled parquet floors;
 - Manufacture of other builders' carpentry and joinery;
 - Manufacture of wooden containers;
 - Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials.

6.3.2 **Quarterly National Household Survey**

The Quarterly National Household Survey (QNHS) is a large-scale, nationwide survey of households in Ireland, which began in September 1997. It is designed to produce quarterly labour force estimates that include the official measure of employment and unemployment in the state. Each quarter field interviewers visit 39,000 households. In figure 25 below, average annual estimates are displayed.

The number of people employed directly in the forestry and logging sector has averaged 2,700 between 1998 and 2014 while the average number employed directly in sawmilling and planing of wood has averaged 7,500 for the same period. A downward trend in employment in the wood processing sector has been a feature since 1998, particularly since the economic recession in 2008, see Figure 25.

³⁶ An Economic Evaluation of the Market and Non-Market Functions of Forestry. Coford. 2013.

³⁷ Irish Forests and the economy. Coford. 2014.

³⁸ Description of NACE codes at <http://www.cso.ie/px/u/NACECoder/NACEItems/searchnace.asp>

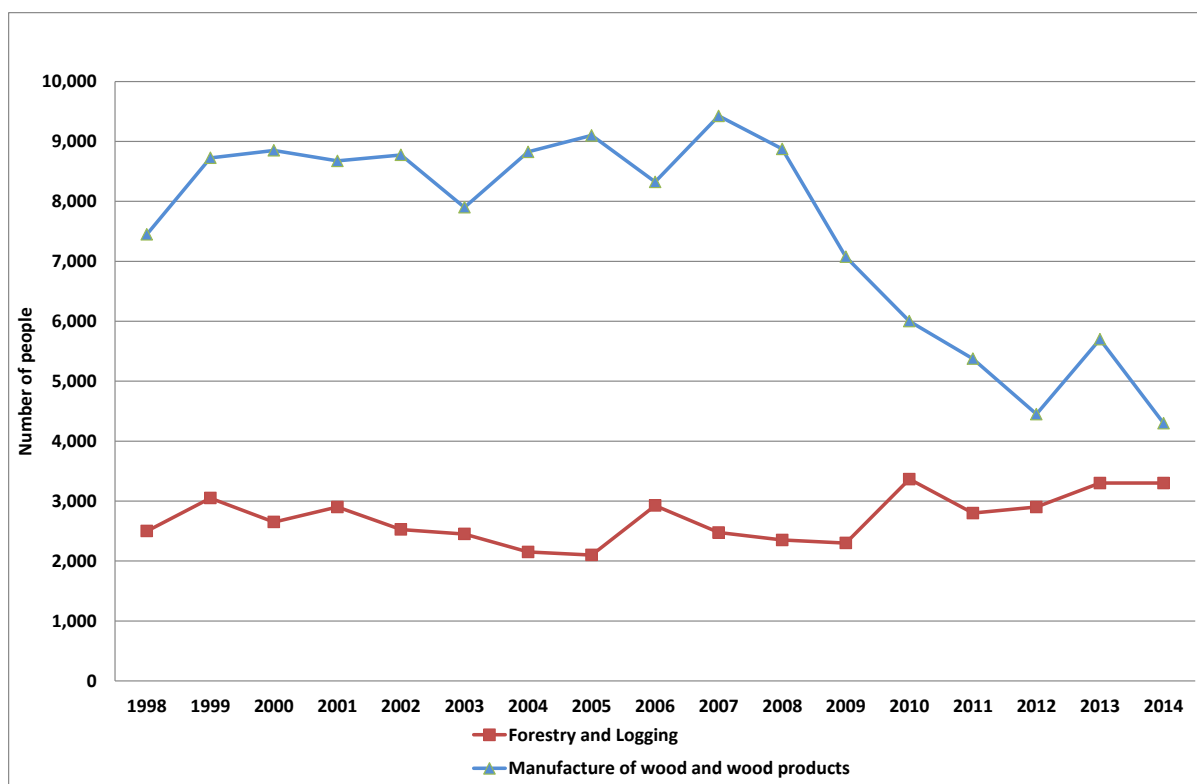


Figure 25. Quarterly National Household Survey labour force estimates 1998 to 2014.

6.3.3 Census of Ireland 2006 and 2011

The table below outlines persons aged 15 and over, classified by principal economic status and detailed industrial group involved in forestry, logging and related activities³⁹. The sector is male dominated, with only 14% of the people female in 2011 (Table 24).

Table 24. Persons 15 years and over involved in forestry by principal economic status.

Forestry and Logging						
Census Year	Total in labour force	At Work			Unemployed (incl. looking for first regular job)	Unemployment rate (%)
		Male	Female	Total		
2006	2,548	2,142	282	2,424	124	4.9
2011	2,308	1,761	269	2,030	278	12
Manufacture of wood and of products of wood and cork, except furniture						
Census Year	Total in labour force	At Work			Unemployed (incl. looking for first regular job)	Unemployment rate (%)
		Male	Female	Total		
2006	6,188	5,168	752	5,920	268	4.3
2011	5,944	4,025	695	4,720	1,224	20.6
Combined						
Census Year	Total in labour force	At Work			Unemployed (incl. looking for first regular job)	Unemployment rate (%)
		Male	Female	Total		
2006	8,736	7,310	1,034	8,344	392	4.5
2011	8,252	5,786	964	6,750	1,502	18.2

³⁹ Source:

http://www.cso.ie/en/media/csoie/census/documents/census2011profile3/Profile3_Statistical_Tables_and_Appendices.pdf

6.4 Forests & Recreation

The Forest Service has a policy of encouraging the use of forests for outdoor recreation. Table 26 shows an upward trend in visitor number to Irish forests between 1999 and 2005.

Table 25. Number of visits to Irish forests 1999, 2004 & 2005.

Year	Number of forest visits
1999 ⁴⁰	8,500,000
2004 ⁴¹	11,000,000
2005 ⁴²	18,000,000

Since the early 1970s there has been an active programme of providing recreational facilities in state forests. At the present time⁴³ there are 150 recreational sites and 11 forest parks in forests throughout the country. In addition to providing recreational sites such as picnic areas and trails, Coillte has an open forest policy that allows free public access to its 445,000 ha estate. The National Parks and Wildlife Service (NPWS) provide access to national parks and nature reserves, and arboreta managed by the Office of Public Works are open to the public. Also urban forests (public forests established and managed for recreation) owned by County Councils or local communities are quite intensively used being close to population centres.

For the private forest estate the decision to allow public access rests with the forest owner, and is provided on a goodwill basis⁴⁴. Private forest owners who have availed of a roading grant in recent years must allow public access to the forest road.

⁴⁰ Clinch, P. (1999), *The Economics of Irish Forestry*, COFORD, Dublin

⁴¹ Bacon, P. and Associates (2004). *A Review and Appraisal of Ireland's Forestry Development Strategy*, Final Report. Stationery Office, Dublin

⁴² Fitzpatrick and Associates (2005). *Economic Value of Trails and Forest Recreation in the Republic of Ireland*. Coillte and the National Trails Strategy Working Group of the Irish Sports Council. Final Report, Dublin

⁴³ <http://www.forestryfocus.ie/social-environmental-aspects/recreation/>

⁴⁴ Forest Service. (2006). *Forest Recreation in Ireland A Guide For Owners & Managers*.

6.5 Forest Service expenditure, 1993-2014

Since 1993, nearly €2 billion has been expended by the state on afforestation and other support measures for the forest sector. In 2013, €109 million was spent on forest activities including afforestation grants, maintenance grants, annual premium payments and grants for forest roading infrastructure (Figure 26). Expenditure in 2014 was an increase of €1.5 million on the previous year. A detailed breakdown of expenditure by activity since 2007 is provided in Table 26.

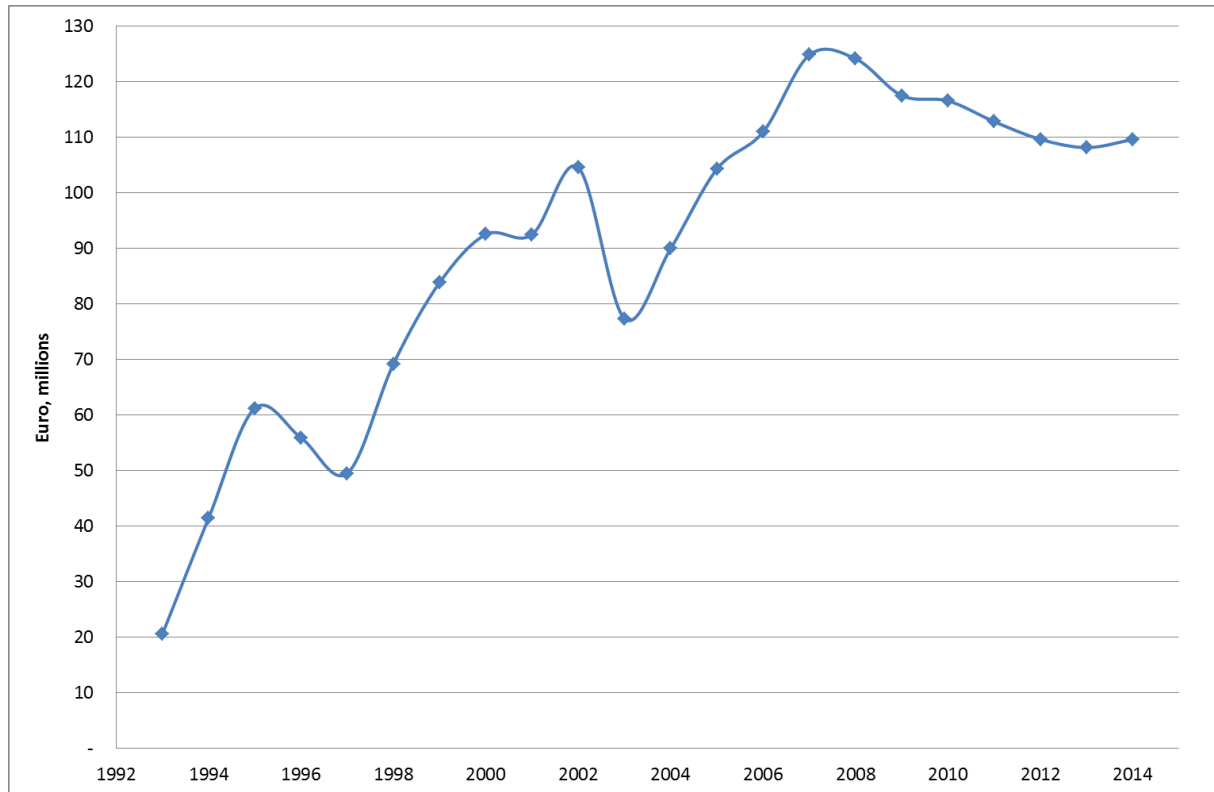


Figure 26. Total Forest Service expenditure 1993-2014.

Table 26. Forest service expenditure, 2007-2014.

Expenditure (Euro)	2007	2008	2009	2010	2011	2012	2013	2014
Main Afforestation Programme								
Grant - 1st Instalment	21,262	19,852	22,080	27,557	20,482	19,215	17,033	16,759
Grant - 2nd Instalment	10,515	9,470	8,675	7,441	7,697	6,334	7,291	7,630
Premium	70,306	74,264	70,496	72,285	75,005	75,685	76,013	77,501
Sundry (e.g. EU Debt Recoveries)	1,088	1,192	1,075	505	647	379	523	620
Afforestation Programme Total	103,171	104,778	102,326	107,789	103,831	101,614	100,860	102,511
Forest Roads-Harvesting	7,517	7,129	5,400	3,694	4,204	3,077	2,709	2,794
Reconstitution of Woodlands	1,579	2,108	790	966	827	567	257	253
Chalara (RCW)	0	0	0	0	0	0	693	1,274
Woodland Improvement Scheme	390	233	374	248	164	70	65	76
Thinning & Tending - WIS	0	0	0	610	750	971	864	666
Shaping of Broadleaves	52	57	83	10	0	0	0	0
Pruning of Conifers	130	189	454	56	0	233	94	0
NeighbourWood	76	578	670	180	351	435	146	6
Native Woodland Conservation	3,763	1,724	851	819	829	1,221	845	514
NDP Other Measures	412	170	52	3	11	-2	0	0
Support Schemes Total	13,919	12,187	8,674	6,587	7,136	6,573	5,673	5,582
Reforestation	4	8	4	13	11	0	5	0
Forest Inventory	106	69	15	7	69	41	30	18
Other Capital Total	110	76	19	20	81	41	35	18
Total Capital	117,201	117,041	111,018	114,395	111,048	108,227	106,568	108,111
Promotion	2,047	1,738	487	289	864	799	828	684
Training	963	820	1,122	954	226	105	80	103
Technical Support	303	379	752	393	92	85	232	266
Fees International Organisations	37	31	37	39	189	8	16	8
Forest Sector Development (COFORD)	4,169	4,258	4,289	401	408	380	425	304
Forestry Consultancy	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	100
Miscellaneous (e.g. legal, printing)	99	-123	-195	94	4	41	20	45
Total Current	7,618	7,103	6,491	2,171	1,782	1,418	1,601	1,510
Overall Total	124,819	124,145	117,510	116,566	112,830	109,646	108,169	109,621

7. Forest Protection and Health

7.1 Introduction

One of the key objectives of the Forest Service is to implement the forestry aspects of the EU plant Health Directive 2000/29/EC which includes monitoring and control programmes for harmful forestry pests and diseases. In this regard with increased levels and new emerging patterns in trade and greater mobility of larger numbers of people, the risk from the introduction of exotic pests and diseases is ever present. Damage may also be caused to forests by abiotic factors, with fire and wind the most common cause.

The majority of forests in Ireland are established using planting stock and ensuring the traceability, suitability and quality of forest seed and plants used is vitally important. The Forest Service has responsibility for the implementation of the Council Directive 1999/105/EC on the marketing of forest reproductive material and the associated implementing regulations as well as the being the designated authority in Ireland for the OECD Scheme for the Certification of Forest Reproductive Material Moving in International Trade.

The Forest Service also oversees the national implementation of the FAO, IPPC International Standard for Phytosanitary Measures (ISPM) No. 15, Guidelines for Regulating Wood Packaging Material in International Trade. Not only is this important in terms of imports and protecting Ireland's forests but also for companies exporting who require compliant wood packaging, thereby facilitating Irish exports of goods of all kinds.

Key statistics

- No harmful pests or diseases for which Ireland has current EU Protected Zone status have been detected in Irish forests during annual surveys;
- Based on Forest Service surveys new Protected Zone status was granted in 2014 by the European Commission for two additional harmful organisms: *Thaumetopoea processioneae* (oak processionary moth) and *Dryocosmus kuriphilus* (oriental chestnut gall wasp);
- The first detection of *Hymenoscyphus fraxineus* (previously referred to as *Chalara fraxinea*) in Ireland was in October 2012. The systematic and targeted plant health surveys undertaken by the Department over the summer months of 2015 recorded significant increases in findings of the disease. As of 12 November 2015 the disease had been confirmed present on ash at a total of 110 plantations, distributed over 18 counties. There were also confirmed findings of the disease in native hedgerows, distributed over 13 counties, and confirmed findings of the disease in roadside plantings distributed over 11 counties.
- *Phytophthora ramorum* was first detected in Japanese larch in 2010 and as of 12 November 2015 has been confirmed present at a total of 47 locations in this tree species;
- In 2010/2011, fire damage peaked at 1500ha. Low levels of damage were experienced in 2012/2013 with levels not exceeding 400ha;
- 69 Seed Collection Permits and 12 Master Certificates of Provenance were issued in 2014 in relation to home collected forest reproductive material;
- 47 Irish companies are currently registered in Ireland to produce wood packaging material to the FAO IPPC International Standard for the Regulation of Wood Packaging Material in International Trade (ISPM No. 15) thus facilitating the export of goods worldwide from Ireland on compliant pallets and crates.

7.2 Biotic – Pests and Diseases

The Forest Service is responsible for implementing the forestry aspects of the EU Plant Health Directive, Council Directive 2000/29/EC on protective measures against the introduction into the Community of organisms harmful to plants or plant products and against their spread within the Community. This Directive has recently been reformed by the European Commission and the Standing Committee on Plant Health in Brussels which is regularly attended by the Forest Service at its monthly meetings. Under the EU Plant Health Directive for logistical plant health reasons the island of Ireland is considered as a whole. As a result there is close co-operation with Northern Ireland's Department of Agriculture and Rural Development involving regular meetings of the North South Ministerial Council and the Plant Health Sub-Group.

The Forest Service implements the provisions of the Directive relating to timber, wood packaging material (pallets, crates, etc.), forest plants, Christmas trees and other forest products and surveys the national forest estate for quarantine forest pests and diseases.

7.2.1 Protected Zone Organisms

Ireland has Protected Zone status for 13 harmful organisms present in other EU Member States but not present here (Table 27). In accordance with Commission Regulation EC No 690/2008 to justify Ireland's Protected Zone status, the Forest Service conducts annual national forest surveys and submits reports annually to European Commission.

Table 27. Protected Zone Survey results 2013-2015

Protected Zone Organism	Forest Detections by Year		
	2013	2014	2015
<i>Cephalcia lariciphila</i> (European web-spinning larch sawfly)	0	0	0
<i>Gilpinia hercyniae</i> (European spruce sawfly)	0	0	0
<i>Gremmeniella abietina</i> (Brunchorstia disease)	0	0	0
<i>Dendroctonus micans</i> (great spruce bark beetle)	0	0	0
<i>Ips amitinus</i> (small spruce bark beetle)	0	0	0
<i>Ips cembrae</i> (large larch bark beetle)	0	0	0
<i>Ips duplicatus</i> (northern bark beetle)	0	0	0
<i>Ips sexdentatus</i> (six-tooted bark beetle)	0	0	0
<i>Ips typographus</i> (eight-tooted spruce bark beetle)	0	0	0
<i>Hypoxylon mammatum</i> (hypoxylon canker)	0	0	0
<i>Cryphonectria parasitica</i> (chestnut blight)	0	0	0
<i>Thaumetopoea processioneae</i> (oak processionary moth)	0	0	0
<i>Dryocosmus kuriphilus</i> (oriental chestnut gall wasp)	0	0	0

7.2.2 Other Regulated Organisms

Other harmful organisms listed in the EU Plant Health Directive of significance which also require mandatory annual surveys and reporting include *Anoplophora chinensis* (citrus long-horn beetle), *Anoplophora glabripennis* (asian long-horn beetle), *Bursaphelenchus xylophilus* (pine wood nematode), *Monochamus spp.* (sawyer beetle), *Phytophthora ramorum* and *Gibberella circinata* (pitch canker of pine).

7.2.3 Surveys

Surveys for the above regulated organisms and for general forest health monitoring purposes, a network of observation points, pheromone traps, bait logs and sampling points distributed around the country in public and private forests and forest nurseries are used. The Forest Service also deals with queries and reports from the industry and general public in relation to forest and tree health issues. This may involve site visits and taking of samples for laboratory analysis. This diagnostic and advisory service is part of the National Forest Protection Policy. During 2015 in excess of 700 ground site visits were conducted for specific plant health reasons (official EU surveys, Ash Dieback surveys and reported site follow ups etc.). With the exception of *Phytophthora ramorum* and *Hymenoscyphus fraxineus* (which is not a regulated disease under the EU Plant Health Directive) there have been no confirmed findings of any other regulated or serious forest pests or diseases.

7.2.4 Ash Dieback (*Hymenoscyphus fraxineus*)

Following the first confirmed finding of the Ash Dieback disease in October 2012, on imported trees used in a forestry plantations; intensive surveys for the disease have been conducted year on year since. In addition to forest surveys, staff in the wider Department conducted surveys in horticultural nurseries, garden centres, private gardens, roadside landscaping and farm agri-environment scheme plantings. The surveys conducted in 2015 included a targeted survey of forestry plantations with imported ash (97 locations) and a systematic survey of 376 National Forest Inventory points (153 forest locations and 223 hedgerow locations) across the country.

The summer surveys also included for the first time a spore-trapping element aimed at detecting, quantifying, and establishing dispersal patterns around known positive locations. The study was conducted with the assistance of experts from the French National Institute for Agricultural Research (INRA).

The position as of 12 November 2015 regarding the total number of confirmed findings up to that date in comparison to those by the end of 2014 is outlined in Table 28 below.

Table 28. Overview of Number and Type of Confirmed Ash Dieback Findings

Location type	Number of Confirmed Findings Oct 2012 to End of 2014	Number of new Confirmed Findings to date in 2015 (12 Nov 2015)	Total to date (12 Nov 2015)
Forestry plantations ¹	54	56	110
Horticultural nurseries	20	5	25
Garden centres	4	0	4
Private gardens	7	0	7
Farm /Agri- environment plantings	23	2	25
Roadside plantings ³	4	9	13
Hedgerows ²	4	7	11
Total	116	79	195

¹ Refers to the total number of forestry plantations with confirmed findings.

² Refers to the number of counties with one or more confirmed native hedgerow findings.

³ Refers to the number of counties with one or more confirmed findings in roadside plantings.

While *Hymenoscyphus fraxineus* is not a regulated disease under the EU Plant Health Directive (Council Directive 2000/29/EC) a Ministerial Order to provide for measures to prevent the spread of *Hymenoscyphus fraxineus* in the genus *Fraxinus* L.. was introduced on the 6th November 2012 (S.I. 431 of 2012). It restricted the movement of ash plants and seed into Ireland as well as imposing restrictions on ash wood imports. Further to the adoption of the 'All Ireland Chalara Control Strategy' in July 2013, which was developed jointly with the Department of Agriculture and Rural Development (DARD) in Northern Ireland, the Department continued its co-operation with the UK authorities throughout 2015. There were eight meetings of the DAFM/DARD Plant Health Sub-Group in 2015.

In May 2015 in order to better inform policy and legislation the Department and DARD commissioned an addendum to the Pest Risk Analysis (PRA) to further investigate the role of wood as a means of spread of the disease and to examine what additional research had been conducted in the specific area since the PRA was completed. The author of the original 2013 report (Dr. Claire Sansford) also produced the addendum. The addendum was received in August 2015 and indicated potential to relax the restrictions in relation to ash wood imports. The legislation in relation to ash wood imports was updated the on Tuesday, 3rd November 2015 (S.I. No 479 of 2015). The new Order restated the provisions contained in the previous Order as they pertain to plant and plant products but introduced a number of changes in relation to the documentary requirements around the importation of ash wood, the required pre-importation treatments, as well as taking into account the change in the scientific name of the organism in 2014.

The Forest Service also continued its participation in the European Cooperation in Science and Technology (COST) funded action into the disease (FP1103 FRAXBACK www.fraxback.eu). In September 2015, further to a request from DARD and the Agri-Food and Biosciences Institute (AFBI), the Forest Service hosted a field day with key researchers in Europe on Ash Dieback disease.

7.2.5 Phytophthora ramorum

Since the first finding in Ireland of *Phytophthora ramorum* in Japanese larch in 2010 the Forest Service has continued to conduct annual ground and aerial surveys of larch with the assistance of the Air Corps and Coillte. At the start of 2015 the disease had been confirmed present in Japanese larch at 44 locations, up from 26 at the start of the previous year. Up to 12 November 2015 the disease has been confirmed present at an additional 3 locations, bringing the total number of confirmed locations in Ireland to 47, and affecting approximately 311ha of forestry (Table 29). Since 2010 the Forest Service has worked with Coillte (as the principle landowner affected) in undertaking sanitation felling of infected larch in an effort to limit spread and continued to do so in 2015. Four statutory disposal notices were issued in 2015 in relation to forest properties infected with the disease.

Table 29. Number of confirmed site findings in Japanese larch.

Year	Number of confirmed new findings
2010	8
2011	4
2012	4
2013	10
2014	18
2015	3

The disease has also been detected during forest surveys on beech, noble fir, Spanish chestnut, *Vaccinium myrtillus* and *Gaultheria shallon* (first world finding in the wild) growing in close proximity to infected Japanese larch. While previous Forest Service surveys detected the disease for the first time worldwide on a single Sitka spruce and European silver fir tree, no subsequent findings have been detected here. Also of significance is that since 2003 a number of detections of the disease have been made in wild invasive rhododendron in forest locations. By the end of 2014 the number of such findings was 26. There were no additional findings in 2015.

Phytophthora kernoviae has been detected by the Forest Service on wild rhododendron in a number of forest locations. By the end of 2014 there were 8 such findings, 6 of which were in forests which also had Japanese larch infected with *Phytophthora ramorum*. To date all the confirmed findings of the disease have been limited to counties Wicklow, Wexford, Kilkenny, Tipperary, Waterford, Cork and Kerry. There were no additional findings in 2015.

In 2015 the Forest Service also made a significant finding in relation to *Phytophthora pseudosyringae*, with the first confirmed detection of the pathogen in Japanese larch in a forest in County Louth.

7.3 EU Plant Health Directive & Protected Zone Monitoring

The Forest Service conduct import inspections of wood and wood products from Third Countries regulated under the EU Plant Health Directive to ensure compliance with entry requirements as part of the Customs clearance process (Table 30). Under the EU internal markets regime goods coming from within the EU are not subject to Customs clearance- but monitored to ensure Ireland's Protected Zone requirements are met. The Forest Service operates two designated Border Inspection Posts in Dublin and Cork ports for import controls from Third countries and has an office in Waterford port. Shipments coming into the other ports and airports are covered from these locations if required.

Table 30 Third Country Timber Import Inspections from January to December 2014

Country	Number of Inspections	Compliant	Non Compliant
USA	233	231	2
Chile	3	3	0
Canada	29	29	0
Russia	4	4	0
Total	269	267	2

In 2013 the European Commission introduced special measures regarding inspections of wood packaging material associated with certain stone commodities imported into the EU from China. In 2014, 191 containerised consignments from china have been inspected, with three non-compliances detected and various phytosanitary measures were imposed including entry refusal (one of the consignments was heavily infested with live longhorn larvae) (Table 31). In addition Forest Service carries out monitoring of Portuguese wood packaging material in relation to the treat of pine wood nematode.

Table 31 Wood Packaging Inspections from Jan to Dec 2014

Country	Number of Inspections	Compliant	Non Compliant
China	191	188	3
Portugal	8	7	1
Other	28	28	0
Total	227	223	4

The Forest Service also provides advice and deal with queries regarding import and export requirements related to wood/wood products and forest reproductive material. Phytosanitary Certificates may also be issued to accompany certain consignments leaving the free trade area of the EU.

7.4 Forest Reproductive Material

The Forest Service is responsible for implementing Council Directive 1999/105/EC on the marketing of forest reproductive material. Forest reproductive material (FRM) is a collective term to describe seeds, plants and cuttings, which are important for forestry purposes. The aim of the legislation is to ensure that forest reproductive material, which is marketed, is from approved suitable sources and is clearly labeled and identified throughout the entire process from tree seed collection to processing, storage, forest nursery production and delivery to the final forest user. In recent years the Forest Service has been participating in the ongoing EU review of seed and propagating material legislation.

The Forest Service provides the following services in relation to forest reproductive material:

- Registration of suppliers of forest reproductive material - seed collectors, nurseries, seed and plant importers and brokers
- Registration of seed stands with the assistance of COFORD
- Issuing of Certificates of Provenance for seed collections
- Advice on forest seed and plant regulations

In 2015 the Forest Service issued 65 Seed Collection Permits down slightly from the previous year (69 issued in 2014). During the same period 41 Master Certificates of Provenance were issued in 2014 (12 issued in 2014). These figures vary from year to year depending on availability of suitable seed and levels of demand.

The Forest Service is also the National Designated Authority in Ireland for the OECD Scheme for the Certification of Forest Reproductive Material Moving in International Trade. The object of the international OECD Scheme is to encourage the production and use of forest seeds, parts of plants and plants that have been collected, transported, processed, raised and distributed in a manner that ensures their trueness to name.

Forest plants may also be subject to the requirements of the EU Plant Health Directive, Council Directive 2000/29/EC on protective measures against the introduction into the Community of organisms harmful to plants or plant products and against their spread within the Community.

7.5 ISPM No. 15 (IPPC International Standard for Wood Packaging Material)

In relation to exports (in addition to import controls), the Forest Service is responsible for the implementation of the FAO, IPPC, International Standard for Phytosanitary Measures (ISPM) No. 15, Guidelines for Regulating Wood Packaging Material in International Trade. ISPM No. 15 describes phytosanitary measures to reduce the risk of introduction and/or spread of quarantine pests associated with wood packaging material made of raw wood, in use in international trade.

Wood packaging material, which is being exported from Ireland to most non-EU countries around the world, is required to comply with ISPM No. 15. ISPM No. 15 thereby facilitates exports by Irish companies of goods of all kinds, which are being transported using wooden pallets, crates, loose wood dunnage etc. In practice wood packaging material made from unprocessed raw wood and used in supporting, protecting or carrying a commodity, must be heat treated or fumigated in a specified manner and each individual unit of the wood packaging material must be stamped on at least two sides with the officially approved ISPM No. 15 mark verifying the treatment and incorporating the country code and the registration number of the producer of the packaging.

ISPM No. 15 currently does not apply to wood packaging material which is being dispatched to other EU Member States. The following services are available in relation to ISPM No. 15:

- Registration of producers of wood packaging material and kiln operators in association with NSAI
- Advice to wood packaging material manufacturers and kiln operators concerning ISPM No. 15
- Advice to importing and exporting companies concerning ISPM No. 15

Currently 47 companies are registered to operate under the scheme in Ireland with 3 new company registered in 2014. Companies in the scheme are inspected to ensure compliance with agreed Standard Operating Procedures and that the wood packaging material is fully compliant with the standard.

7.6 Abiotic

This section details the extent of damage to the forest estate arising from non-living or abiotic sources.

7.6.1 Forest fires

Forest fires normally occur each year in Ireland and reach their peak in spring, particularly in forests established on formerly unenclosed land, with a preponderance of purple moor grass and heather vegetation. Figure 27 shows the area of forests damaged by fire from 1930 to 2014. In the late 70s and early 80s considerable areas of public forest were burnt. The scale of fire damage in public forests has decreased in recent years. However fire damage levels were high in both public and private forests in 2010 and 2011 following protracted dry periods in spring.

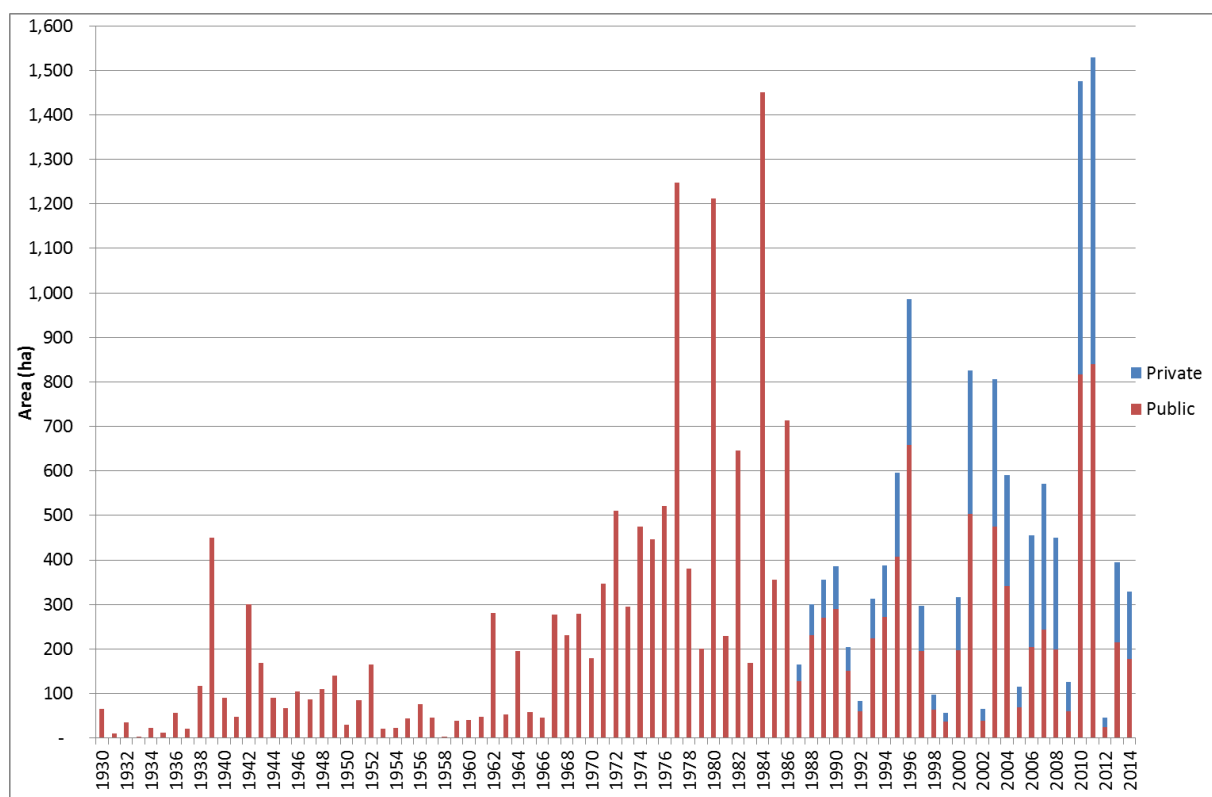


Figure 27. Area of forest damaged by fire 1930-2014⁴⁵

⁴⁵ Estimates of fires in privately-owned forests for the periods 1985-2005 and 2010-2014, were derived from the proportion of private forest area to public forest area.

8. International comparators

8.1 Introduction

This chapter contains information international forest cover and other key statistics such as increment are presented. Information is primarily presented on forests in the EU 28.

Key statistics

- Forest cover in Ireland, at 10.5% in 2012 is one of the lowest in the EU where the average is 33.5%; Worldwide forest cover is 30.6%;
- Ireland, at 54% is close to the EU average of 59% for public forest ownership;
- Annual roundwood harvest at 2.7 million m³ in 2010 compares a with an EU average of 18.9 million m³ in the same year;
- Fellings represented at 47% of annual increment in 2012, which is below the EU average of 59%, which is a reflection of the relatively young age of Ireland's forests in comparison to the rest of the Europe;
- Since 1990 Ireland has had the highest rate of increase in forest expansion, as a percentage of total forest cover, among EU Member States.

8.2 Global & EU 28 Forest Cover

Despite having afforested 294,000 ha since 1990, Ireland remains one of the least forested countries in Europe, with over 10% forest cover and 0.8% of the total European forest cover (Figures 28 - 30). This compares with 33.5% for the EU 28 and 30.6% worldwide.

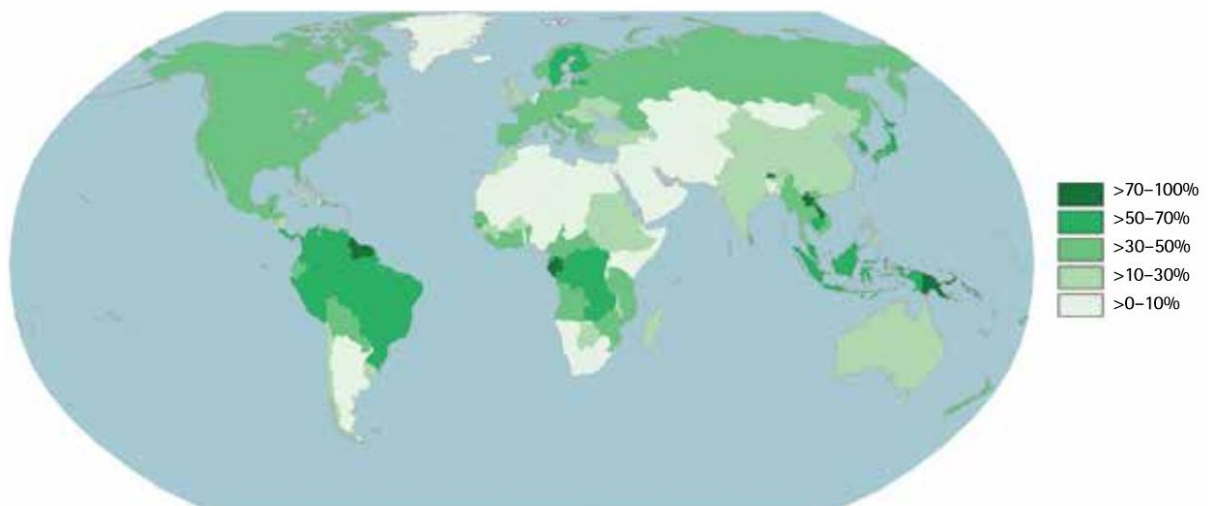


Figure 28. Global forest cover , 2015. (Source: FAO Global Forest Resources Assessment 2015)

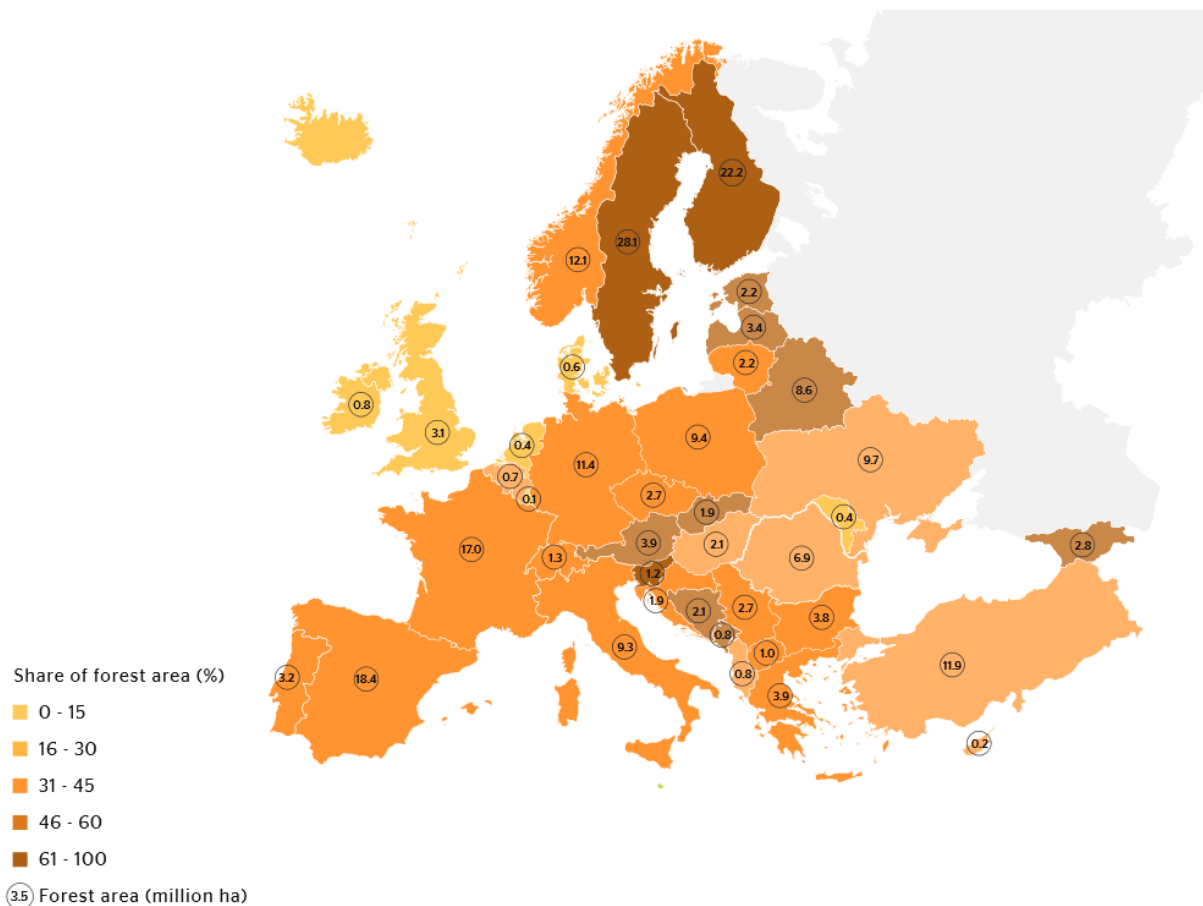


Figure 29. Forest area (million ha) and share (percentage) of land area by country, 2015 (Source: State of Europe's Forests 2015)

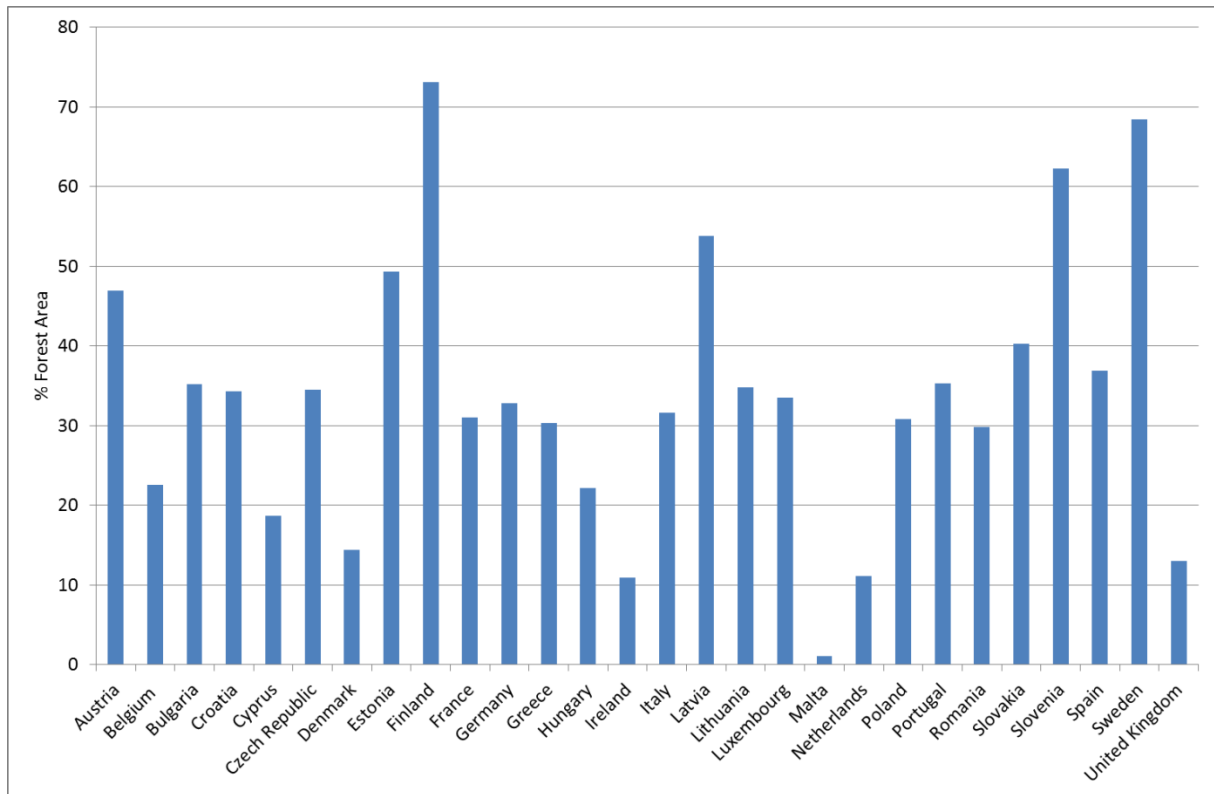


Figure 30. Forest cover in EU 28, 2015. (Source: State of Europe's Forests 2015)

8.3 Forest comparison: EU 28

Public forest ownership in Ireland at 54% is close to the EU average of 59% (Figure 31). Due to afforestation, the proportion of privately owned forest is increasing in Ireland. Germany has the highest total growing stock of the EU 28, at over 3.6 billion m³ (Figure 32).

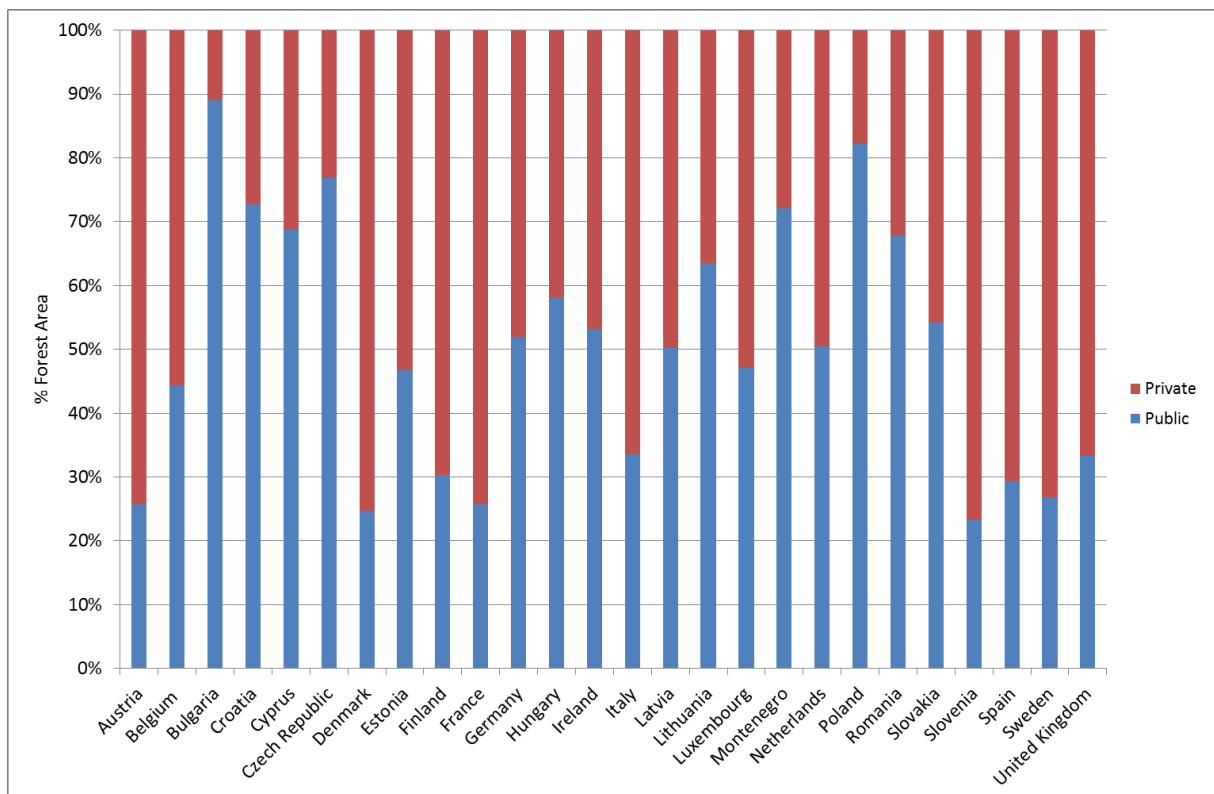


Figure 31. Forest ownership in the EU 28, 2010. (Source State of Europe's Forests 2015).

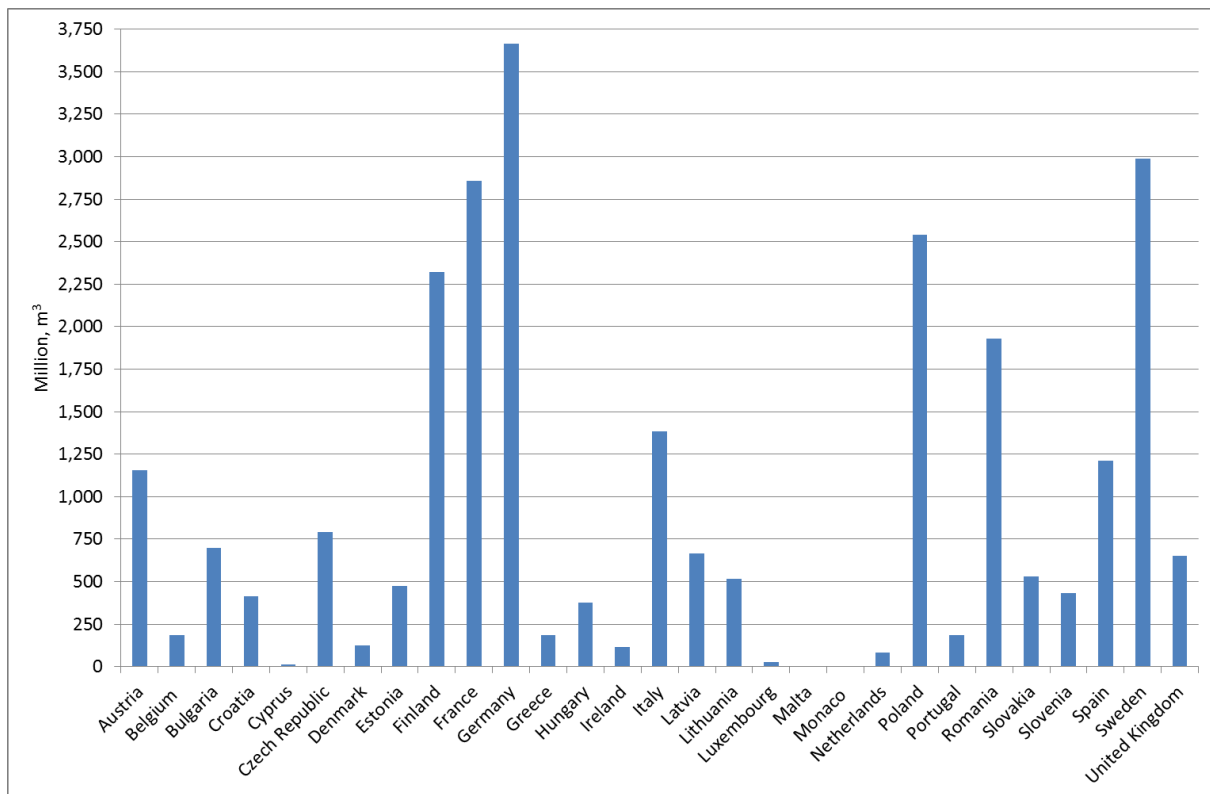


Figure 32. Growing stock in the EU 28 countries, 2015 (Source State of Europe's Forests 2015).

Annual roundwood harvest at 2.7 million m³ in 2010 compares with an EU average of 18.9 million m³ in the same year (Figure 33). Fellings represented at 47% of annual increment in 2010, which is below the EU average of 59% (Figure 34), which is a reflection of the relatively young age of Ireland's forests in comparison to the rest of the Europe.

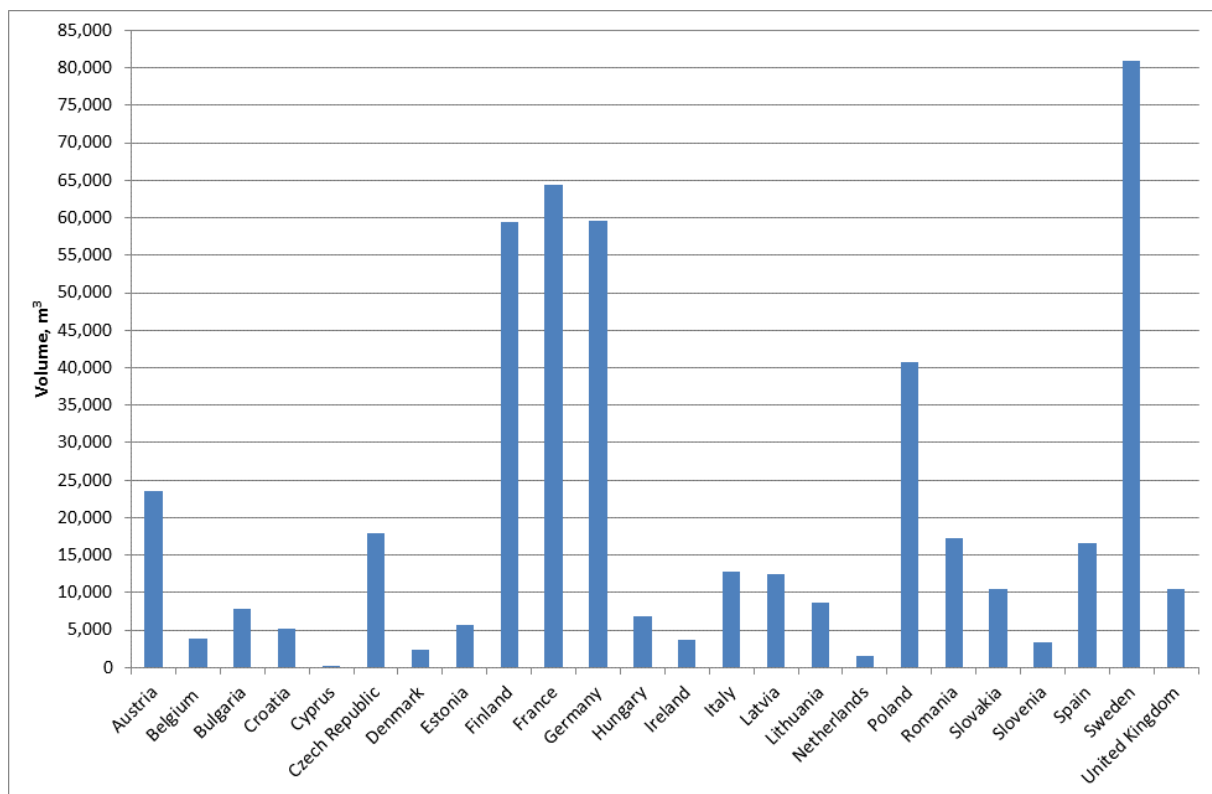


Figure 33. Felling volumes in the EU 28, 2010. (Source: State of Europe's Forests 2015)

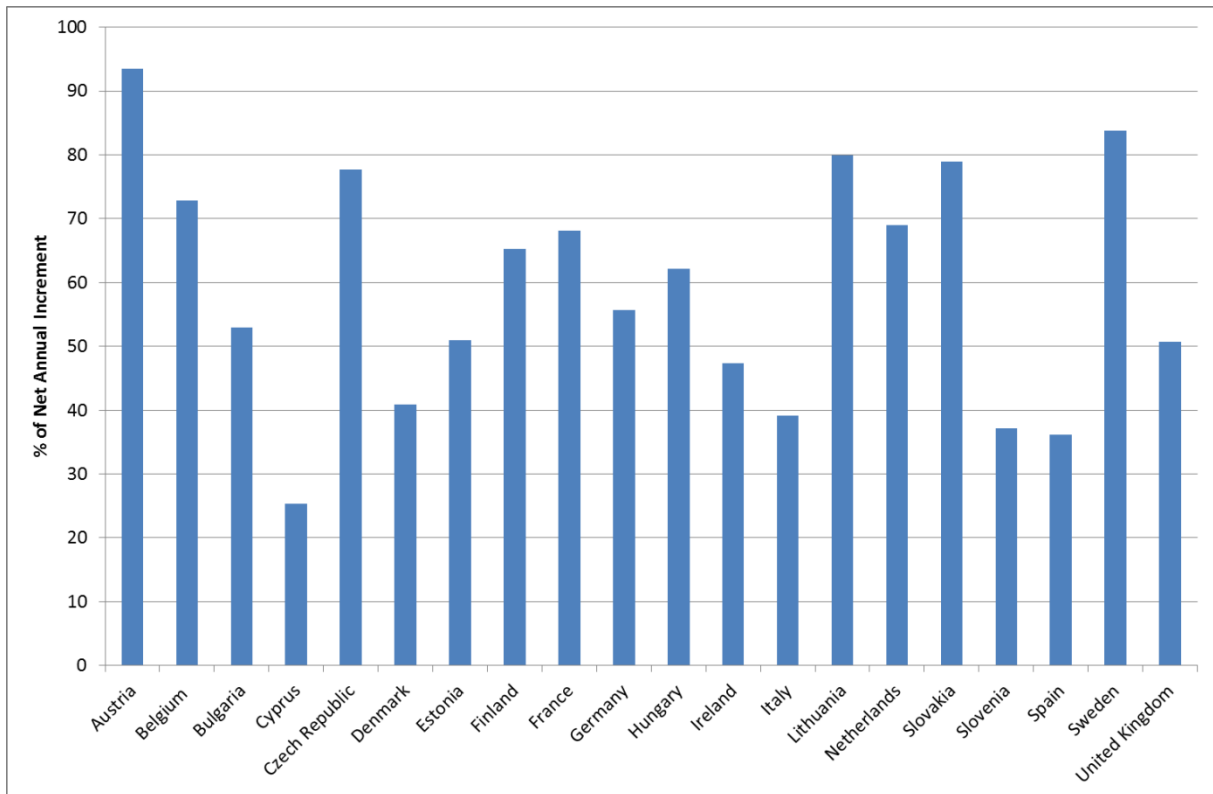


Figure 34. Harvest as a percentage of net annual increment 2010. (Source: State of Europe's Forests 2015)

8.4 European Forest Expansion Rate

According to the State of Europe's Forests 2015 report, since 1990 Spain has had the greatest expansion of forests at 184,000 ha per year, France at 102,000 ha per year and Turkey at 93,000 ha per year. The annual rate of change, expressed as a percentage of total forest area is highest for Iceland (4.6%), Ireland (2.0%) and Spain (1.2%) for the period 1990-2015 (Figure 35).

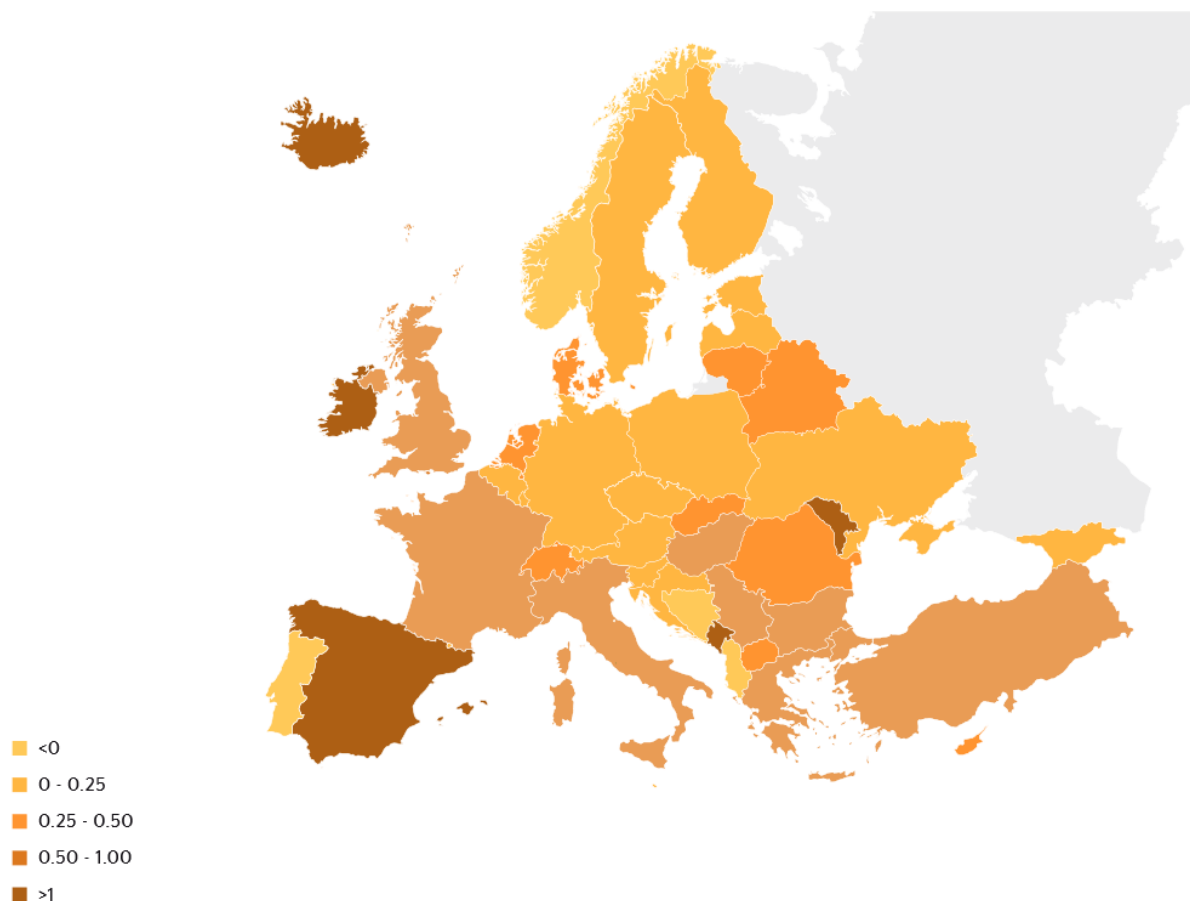


Figure 35. Annual rate of change in forest area by country 1990 -2015 (percent). (Source: State of Europe's Forests 2015)

