



An Roinn Talmhaíochta,
Bia agus Mara
Department of Agriculture,
Food and the Marine

Forest Statistics Ireland 2021

Prepared by the Department of
Agriculture, Food and the Marine

agriculture.gov.ie

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.

Published by:

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June 2021

Foreword

As the Minister with responsibility for Forestry in the Department of Agriculture, Food and the Marine, I am delighted to present **Forest Statistics - Ireland 2021**. This document is updated annually by my Department to provide current information to all within the forest sector and the wider public. As I engage with all stakeholders on the commitments in the Programme for Government and Project Woodland, now, more than ever, reliable and up-to-date information is needed as we chart a new and improved direction for forestry in Ireland.

Forest Statistics – Ireland 2021 includes up-to-date information on all aspects of the forest sector in Ireland including planting rates, species composition, harvesting, carbon sequestration, forest health, employment, recreation and comparisons with our European and global counterparts. It is the definitive compendium of up-to-date information on forestry in Ireland and is the go-to reference document for those interested in Irish forestry. The information in the annual report demonstrates the Government's ongoing commitment to forestry.

The decreasing trend in the area being afforested annually is something that needs to be addressed. New forestry is essential to meeting not only our economic objectives but also our climate change targets and our aims in terms of enhancing biodiversity. The vital importance of forestry to deliver on society's needs is well understood and the need to unlock this value into the future is clear. Therefore, the immediate priority is to address the current licensing difficulties and deliver on the objectives set-out in Project Woodland.

It is worth highlighting the fact that while Ireland has one of the lowest levels of forest cover in Europe, Ireland has one of the highest annual rates of increase in forest cover in Europe. I am particularly pleased with the increase in the proportion of broadleaves afforested from 25% in 2019 to 34% in 2020, which is also reflected in a similar increase in the Native Woodland Establishment scheme operated by my Department.

In conclusion I want to thank all involved in producing **Forest Statistics – Ireland 2021** and making this information available to the forest sector and wider public. As well as providing up-to-date information on Irish forestry, the publication is an excellent benchmark for measuring progress in the forest sector over the coming decade and beyond.

Senator Pippa Hackett

Minister of State for Forestry

June 2021

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1. Introduction

The Department of Agriculture, Food and the Marine is responsible 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; “Regulation (EU) 2018/841 of the European Parliament and of the Council of 30 May 2018 on the inclusion of greenhouse gas emissions and removals from land use, land use change and forestry in the 2030 climate and energy framework, and amending Regulation (EU) No 525/2013 and Decision No 529/2013/EU”, commonly referred to as the LULUCF Regulation”
- Food and Agriculture Organisation (FAO) for series of forest related data including the Global Forest Resource Assessment;
- Statistical office of the European Union (EUROSTAT);
- United Nations Economic Commission for Europe (UNECE) for wood harvest and trade data (the Joint Forest Sector Questionnaire);
- Joint Wood Energy Enquiry of the UNECE, IEA and FAO;
- FOREST EUROPE (The brand name of the Ministerial Conference on the Protection of Forests in Europe);
- European Commission in respect of forest health.

Forest Statistics is an annual compilation of statistics on the forests and the forest industry in Ireland.

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. The data in each report relate to the year prior to the year of publication e.g. the data range in the 2021 edition includes information up to the end of 2020. However, as there is a certain time-lag before statistics are finalised for a given year, the relevant sections will be revised to include the new data when it becomes available.

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

- Forest trees began recolonising Ireland following the end of the last glacial stage 10,000 years ago. Analysis of pollen from peat bogs illustrates the establishment of forests that once covered 80% of the land surface;
- The area of forest is estimated to be 770,020 ha or 11% of the total land area of Ireland (National Forest Inventory 2017);
- Forest cover is estimated to be at its highest level in over 350 years;
- Of the total forest area, 391,357 ha or 50.8% is in public ownership, mainly Coillte¹;
- The forest estate is comprised of 71% conifers and 29% 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, Food and the Marine.

2.2 Forest definition

The National Forest Inventory defines forests 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 2017, the 3rd National Forest Inventory (NFI) estimated the area of forest to be 770,020 hectares or 11% of the land area, excluding inland water bodies (Table 1 and Figure 1). Of the total forest area, 687,525 ha or 89.3% comprises areas occupied by trees or potentially occupied by trees, while permanently unstocked open area within the forest (roads, ridelines, powerlines, etc.) comprises 82,496 ha or 10.7%. Leitrim is the county with the highest percentage of forest cover (18.9%), while Cork has the largest forest area (90,020 ha) (Table 1). Nearly two-thirds (65.5%) the stocked forest area is conifer forest, while 20.5% is broadleaved forest and 14% is mixed forest. Information on the composition of tree species planted annually as part of afforestation scheme is presented in Chapter 3.

Table 1. Forest Area by County (NFI, 2017).

County	Forest Area (ha)	Percent Forest Cover within County (%)
Carlow	8,403	9.4
Cavan	18,032	9.3
Clare	55,106	17.2
Cork	90,020	12.1
Donegal	55,534	11.4
Dublin	6,011	6.5
Galway	60,605	9.9
Kerry	57,540	12.1
Kildare	10,396	6.1
Kilkenny	19,825	9.6
Laois	26,462	15.4
Leitrim	30,061	18.9
Limerick	27,933	10.4
Longford	9,160	8.4
Louth	2,428	2.9
Mayo	51,325	9.2
Meath	13,326	5.7
Monaghan	5,997	4.6
Offaly	29,332	14.7
Roscommon	28,311	11.1
Sligo	20,980	11.4
Tipperary	50,241	11.8
Waterford	26,949	14.7
Westmeath	15,163	8.2
Wexford	14,620	6.2
Wicklow	36,262	17.9
Total	770,020	

Trees began recolonising Ireland at the end of the last glacial stage 10,000 years ago. Analysis of pollen from peat illustrates the establishment of forests that once covered 80% of the land surface². In the sixteenth and early seventeenth centuries significant forest exploitation occurred as a result of the cutting of wood for use in: ships, barrel staves, and for charcoal for iron and glass work. By the early 1700's all but the least accessible forests had been cleared.³

The changes in forest cover in Ireland since 1656 are indicated in Table 2 and Figure 1. 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 forest cover on the island of Ireland was still declining up to 1928.

Since the foundation of the State, forest cover in Ireland has grown from 1.4% of the land area, to the current 11%. Figure 2 shows the growth in area of both public and private forests over this period. Four inventories of the private forest estate have taken place: 1973, 2006, 2012 and 2017. The area of privately-owned forests has increased from 81,958 ha in 1973 to 378,663 ha in 2017, over a four-fold increase. Over the same period, the State owned forest area has also significantly increased from 242,056 ha to 391,357 ha. The 770,020 ha of forest in Ireland in 2017 represents 11% of the total land area (Figure 3).

Table 2. Development of forest area in Ireland.

Year	Area (ha)	% of Total Land Area
1656 ⁴	170,000	2.5
1841 ⁵	140,000	2.0
1908 ⁶	125,200	1.8
1918 ⁷	100,717	1.4
1928 ⁸	89,000	1.2
1942 ⁹	87,066	1.3
1950 ¹⁰	96,047	1.4
1965 ¹¹	254,350	3.7
1973 ¹²	323,654	4.6
1985 ¹³	411,529	5.9
2006 ¹⁴	697,730	10.1
2012 ¹⁵	731,650	10.5
2017 ¹⁶	770,020	11.0

² Mitchell, J. G. 1995. The Dynamics of Irish Post-Glacial Forests. In: Wood, trees and forests. Royal Irish Academy. Proceedings of a Seminar Held on 22 and 23 February 1994. Dublin

³Anon. 1979. *Irish Forestry Policy*. National Economic and Social Council. Government Publication Office

⁴ Rackham, O., 1986. *The History of the Countryside*. Dent & Sons Ltd., London.

⁵ Aalen, F. H. A., Whelan K. and Stout M. (Eds). 1997. *Atlas of the Irish Rural Landscape*. Cork University Press

⁶ Dept. of Agri. & Technical Instruction. 1908. *Report of the Departmental Committee on Irish Forestry*. A. Thom & Co.

⁷ Dept. of Agriculture, 1926. *Forest Lands and Timber Supply in the Irish Free State*. Proceedings of the First International Congress on Sylviculture, Rome, 1926.

⁸ Minister for Lands & Agriculture. Dail Eireann, Volume 23, 3rd May 1928.

⁹ Report on Forestry Mission to Ireland, 15th February 1951. Published by Food and Agriculture Organisation.

¹⁰ Report on Forestry Mission to Ireland, 15th February 1951. Published by Food and Agriculture Organisation.

¹¹ Estimate generated from Annual Report of the Department of Agriculture, 1964/65.

¹² 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.

¹³ Estimate generated from Annual Report of the Department of Agriculture, 1985.

¹⁴ *National Forest Inventory Republic of Ireland Results*. 2007. Dept. of Agriculture, Fisheries and Food.

¹⁵ *National Forest Inventory Republic of Ireland Results*. 2013. Dept. of Agriculture, Food and the Marine.

¹⁶ *National Forest Inventory Republic of Ireland Results*. 2017. Dept. of Agriculture, Food and the Marine.

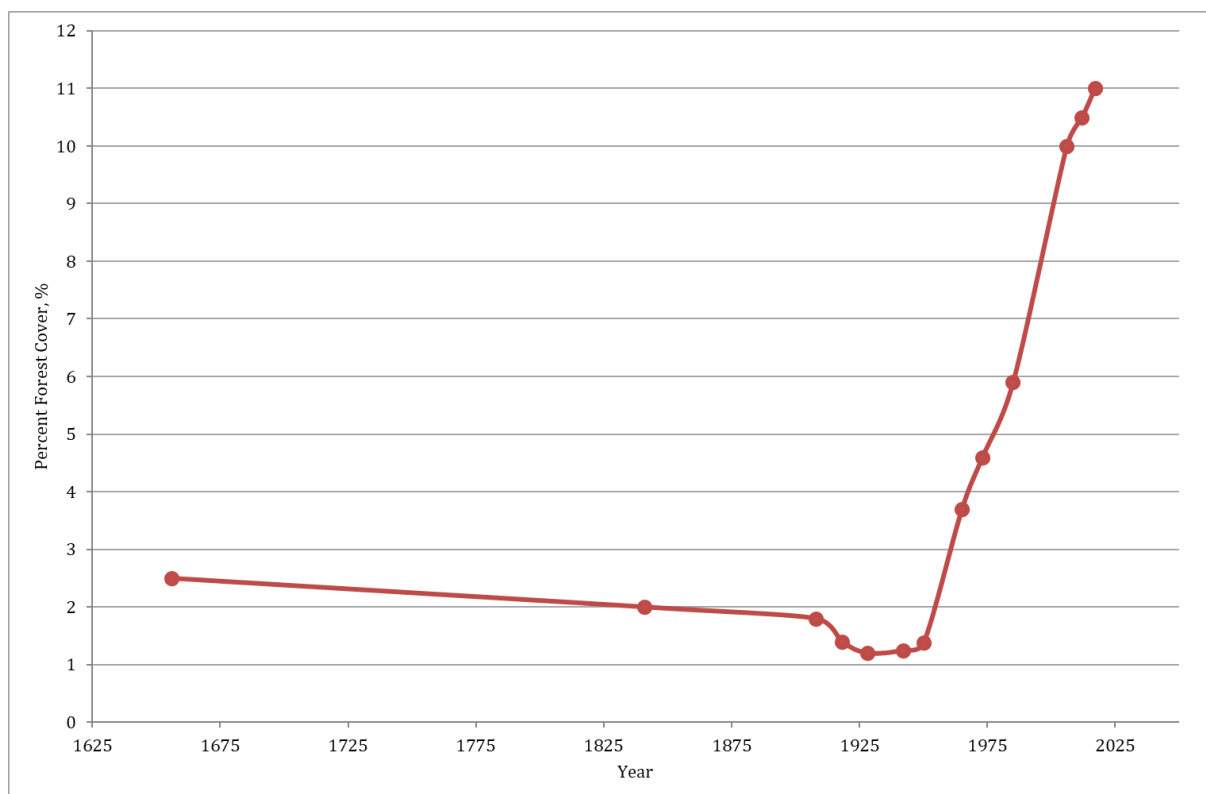


Figure 2. Ireland's forest cover, 1656-2017.

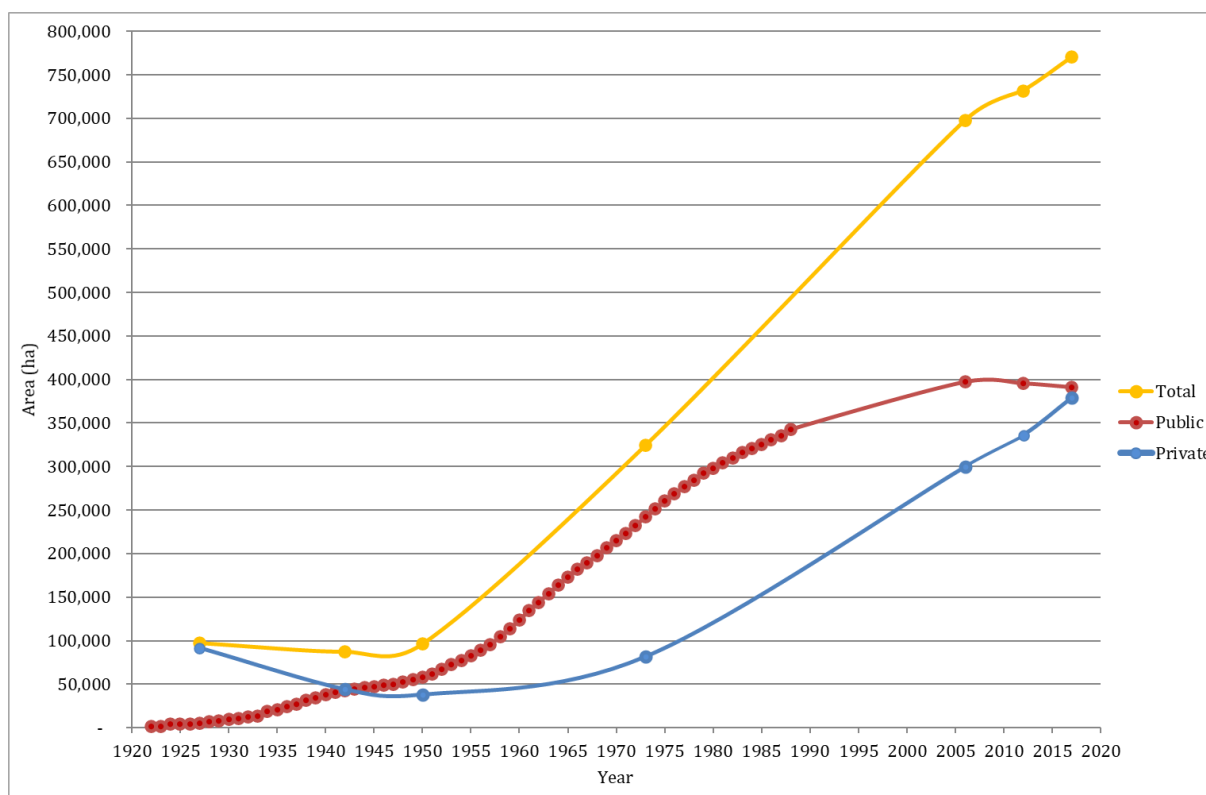


Figure 3. Forest area change since the foundation of the State, 1922-2017.

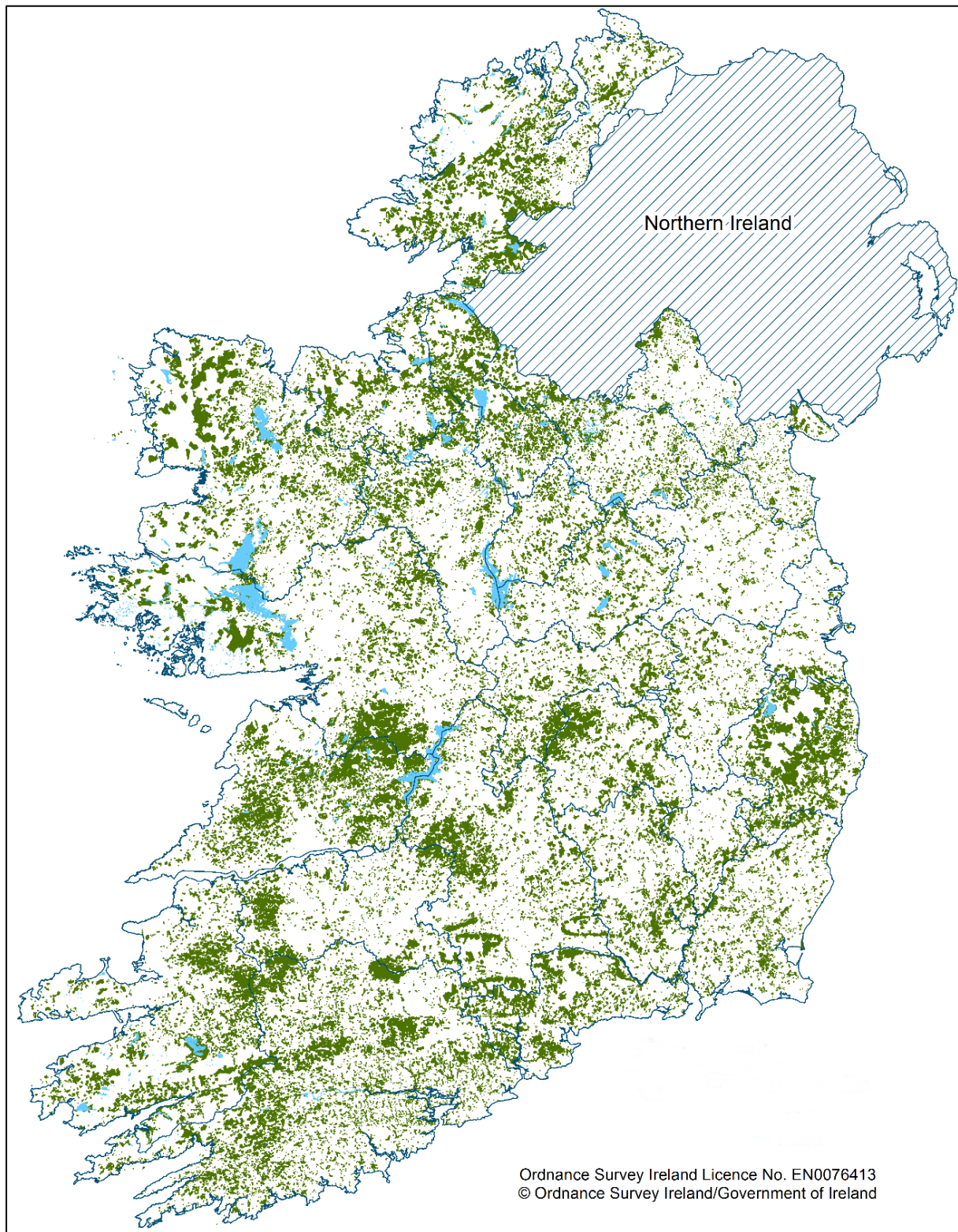


Figure 1. Forest cover in Ireland.

2.4 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 (non grant-aided):** private forests not in receipt of grant-aid post 1980. Includes areas semi-natural forests that have regenerated naturally and other long-standing plantations on private estate holdings.

In 2017, 50.8% of forests were in State ownership, a reduction from 57% in 2006 (primarily due to private sector afforestation in the intervening period). The public forest area (Table 3), consists of 391,357 ha; comprises 357,290 ha of stocked forest land and 34,060 ha of forest open area. Coillte owns 380,156 ha of the public forest area.

Table 3. Forest ownership in Ireland (NFI, 2017)

Ownership	Area (ha)	%
Public	391,357	50.8
Private (grant-aided)	268,100	34.8
Private (non grant-aided)	110,563	14.4
Total	770,020	100

2.5 Forest composition

The national forest estate is expanding and now stands at 11% of the total land area, with a wide variety of forest types present. The majority of the forests are considered stocked as there are tree species present. Forest open areas (e.g. firebreaks) and temporarily unstocked areas (e.g. areas awaiting replanting) are also present and these are an integral part of the forest estate (Table 4a).

Sitka spruce is the most common species, occupying 44.6% of the total forest area. Over one quarter of the forest contains broadleaves. One-third (33.6%) of the broadleaves are 'Other broadleaf species' (both long living and short living), of which over half are willow¹⁶. The next largest broadleaf species group was birch (24.4%), followed by ash (13.1%) and oak (9.2%). Conifers occupy 479,530 ha while broadleaved species cover 193,580 ha. The percentage of each species is also presented in terms of the total stocked forest area (Table 4b).

The interpretation of stocked areas of individual species presented in Table 4a and 4b 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 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.

¹⁶ 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, nothofagus spp., 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 4a. Composition of the total forest area (NFI, 2017).

Forest Composition		Area (1,000s ha)	%
Stocked Forest Area (i.e. the area with trees present)	Sitka spruce	343.3	44.6
	Norway spruce	25.8	3.3
	Scots pine	7.7	1.0
	Other pine spp.	64.9	8.4
	Douglas fir	10.4	1.3
	Larch spp.	24.5	3.2
	Other conifers	3.0	0.4
	Total Conifer	479.5	62.3
	Pedunculate and sessile oak	17.9	2.3
	Beech	10.0	1.3
	Ash	25.3	3.3
	Sycamore	10.1	1.3
	Birch spp.	47.3	6.1
	Alder spp.	17.9	2.3
	Other short living broadleaves	53.3	6.9
	Other long living broadleaves	11.8	1.5
	Total Broadleaf	193.6	25.1
	Total stocked forest	673.1	87.4
Forest Open Area		82.5	10.7
Temporarily Unstocked Area		14.4	1.9
Overall Forest Area		770.0	100

Table 4b. Species Composition of the total stocked forest area (NFI, 2017).

Species	Area (ha)	%
Sitka spruce	343,310	51.1
Norway spruce	25,770	3.8
Scots pine	7,660	1.1
Other pine spp.	64,890	9.6
Douglas fir	10,380	1.5
Larch spp.	24,490	3.6
Other conifers	3,030	0.4
Pedunculate and sessile oak	17,880	2.7
Beech	10,030	1.5
Ash	25,280	3.8
Sycamore	10,100	1.5
Birch spp.	47,270	7.0
Alder spp.	17,910	2.7
Other short living broadleaves	53,280	7.9
Other long living broadleaves	11,820	1.8
Total	673,110	100

2.6 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, and 79.6% of conifers are 30 years old or less while 60.9% of broadleaves are 30 years old or less. The age structure of the national forest estate differs according to ownership: 68.5% of the public forest is aged 30 years or less; 59.6% of the Private (non grant-aided) category is aged 31 years or more; and 97.8% of the Private (grant-aided) category is aged 30 years or less, reflecting the increased afforestation rates in this category since the late 1980's.

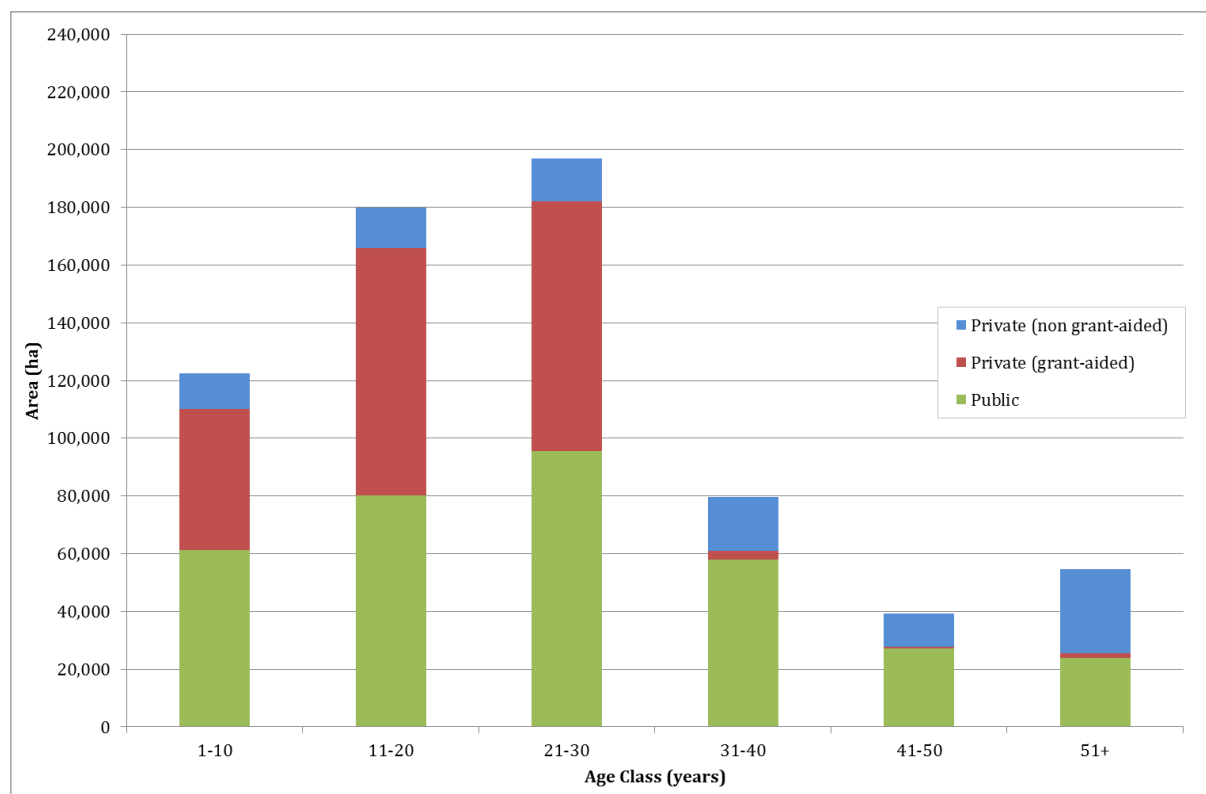


Figure 4. Forest age-class distribution by ownership (Source: NFI, 2017).

2.7 Hedgerows and Trees outside the Forest

2.7.1 Extent of Hedgerows and Trees outside the forest

In 2011 Teagasc produced a hedgerow map of Ireland, based upon 2005 orthophotography¹⁷. All areas of mature hedgerows, individual trees and non-forest woodland and scrub were digitally mapped to a 1 metre resolution. National cover of hedgerows, individual trees and non-forest woodland and scrub was estimated at approximately 482,000 ha, or 6.4%, with an 80% accuracy. Table 4 displays the results on a county level.

The third National Forest Inventory (2017) estimates national hedgerow and non-forest other wooded land at 347,690 ha, or 4.9% cover. This estimate differs from the Teagasc Irish Hedge Map estimate from 2011, which is most likely due to differing methodologies. In addition, the Teagasc Irish Hedge Map includes areas of non-forest woodland and scrub that under the NFI were classified as Forest.

Table 4. County level estimates of non-forest hedgerow, scrub and woodland (HSW) cover (The Irish Hedge Map, Teagasc, 2011).

County	Area of HSW (ha)	% of National HWS Stock	% of County under HWS
Galway	30,000	6.7	4.9
Leitrim	11,000	2.4	6.9
Mayo	23,000	5.1	4.1
Roscommon	19,000	4.2	7.5
Sligo	11,000	2.4	6
Carlow	8,000	1.8	8.9
Dublin	5,000	1.1	5.4
Kildare	14,000	3.1	8.3
Kilkenny	19,000	4.2	9.2
Laois	12,000	2.7	7
Longford	8,000	1.8	7.3
Louth	8,000	1.8	9.8
Meath	24,000	5.3	10.2
Offaly	13,000	2.9	6.5
Westmeath	17,000	3.8	9.2
Wexford	20,000	4.4	8.5
Wicklow	10,000	2.2	4.9
Clare	22,000	4.9	7
Cork	57,000	12.7	7.6
Kerry	23,000	5.1	4.8
Limerick	25,000	5.6	9.3
Tipperary	35,000	7.8	8.1
Waterford	12,000	2.7	6.5
Cavan	20,000	4.4	10.4
Donegal	20,000	4.4	4.1
Monaghan	16,000	3.6	12.4
Total	482,000	6.4	

¹⁷ The Irish Hedge Map – Version 1.0. Teagasc, 2011.

2.7.2 Agri-Environmental Schemes

Since the introduction of agri-environmental schemes in 1994 6,605 kilometres of new hedgerows and more than 3.7 million trees have been established on non-forest land as outlined in Table 5.

Table 5. The total estimate of newly established hedgerows and trees under agri-environmental schemes (Department of Agriculture, Food and the Marine, 2018).

Scheme	Newly established hedgerows (km)	Newly planted trees	Newly planted orchard trees
Rural Environment Protection Scheme (REPS) 1994 - 2010	4,100	1,702,972	N/A
Agri-Environnment Options Scheme (AEOS) 2010 - 2014	1,322	464,910	N/A
Green Low Carbon Agri-Environment (GLAS) 2014 - 2018	1,183	1,617,516	11,182
Total	6,605	3,785,398	11,182

2.7.3 Biomass and Carbon

A 2014 report from the Environmental Protection Agency (EPA) examining the feasibility of a national hedgerow inventory estimated that hedgerow and non-forest woodland and scrub could potentially be sequestering 0.66 - 3.3 tonnes of CO₂/ha/year¹⁸. Based on existing national estimates for hedgerow and non-forest woodland and scrub cover, it states that this could result in a net removal of 0.27-1.4 Mt CO₂/year. The value of hedgerows and trees outside of forests is reflected in recently introduced agri-environmental measures which have resulted in the establishment of new hedgerows and trees outside of the forest.

A second EPA project titled, *Biomass Retrieval in Ireland using Active Remote sensing (BRIAR)*¹⁹, examined the use of radar to estimate biomass stocks in hedgerows. The Ordnance Survey Prime2 spatial data storage model was applied in conjunction with developed maps showing the probability of a field boundary being a stone wall or a hedgerow, to give a new national estimate for hedgerow length in Ireland of 689,000 km. This estimate is double the frequently quoted figure of 300,000 km because of a much wider definition of “hedgerow” used in the BRIAR report. Net change in hedgerow length was examined using the aerial photographic records from 1995, 2005 and 2015, along with county-level survey records, showing that there has been a net removal of hedgerows between 1995 and 2015 of between 0.16% and 0.3% per annum, although the rate is much slower in the latter half of that period.

¹⁸ Carbon Sequestration by Hedgerows in the Irish Landscape. Climate Change Research Programme (CCRP) 2007–2013 Report Series No. 32. Environmental Protection Agency, 2014.

¹⁹BRIAR: Biomass Retrieval in Ireland using Active Remote sensing. EPA Research Programme 2014–2020 Report Series No. 2014-CCRP-MS.17. Environmental Protection Agency, 2019.

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 1950's, but thereafter increased up to the year 2000;
- Private afforestation came to the fore in the mid-1980's: over 300,000 ha of private forests were established between 1980 and 2020;
- The proportion of broadleaf afforestation significantly increased after 1993, and up to the present, averaging 23% of all afforestation since that year. Broadleaf afforestation accounted for 34% of the area afforested in 2020;
- Tree diseases such as *Phytophthora ramorum* (mainly affecting larch) and Ash Dieback (*Hymenoscyphus fraxineus*) may influence species diversity into the future;
- 81% of the forests afforested since 1980 have been planted by farmers;
- The average size of private grant-aided parcels of land afforested between 1980 and 2020 was 8.6 ha;
- Since 1980, 23,491 individual private forest owners have received grant aid to establish their forests;
- Nearly half (46.4%) of all individual owners have received afforestation grant aid at least twice since 1980, which should contribute to management efficiencies, due to the increased size of the individuals forest holding.

3.2 Afforestation

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 1950's. The level of State afforestation dramatically increased from the 1950's up to 2000, after which State planting declined to a negligible level.

Private afforestation came to the fore in the mid-1980's 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 1980's and 1990's are shown in Figure 5.

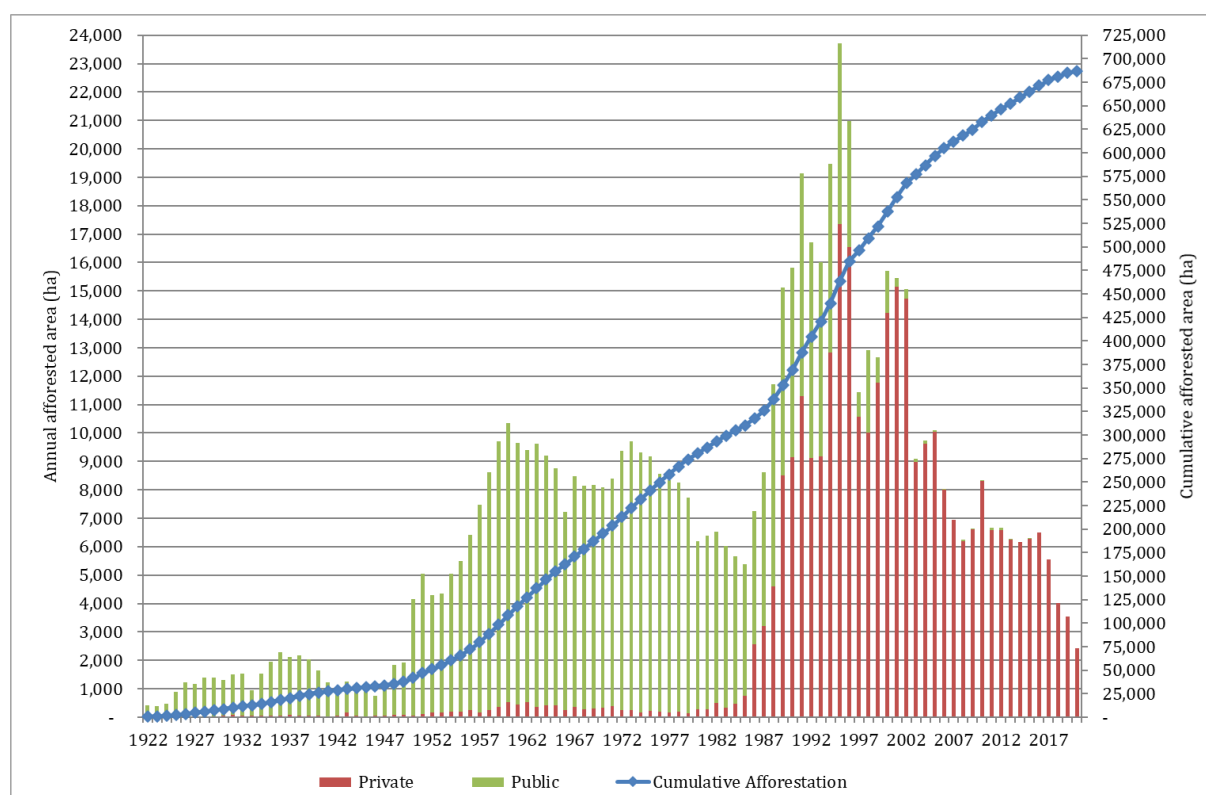


Figure 5. Annual State and private afforestation (1922-2020).

Figure 6 displays the ratio of broadleaf and conifer afforestation from 1935 to the present. During the 1930's and 1940's, afforestation consisted of approximately 90% conifer species and 10% broadleaf species, and from the late 1940's to the early 1990's, broadleaves comprised approximately 4% of all 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 increased significantly from 1993 up to the present, reaching a high of 37% from 2008 to 2011. Broadleaf afforestation subsequently declined to 20% in 2015 and 2016, primarily due to restrictions on planting ash (due to *Hymenoscyphus fraxineus*), but by 2020 had increased to 34% of all afforestation. From 1993 to the present broadleaf afforestation has averaged 24% and conifers 76%.

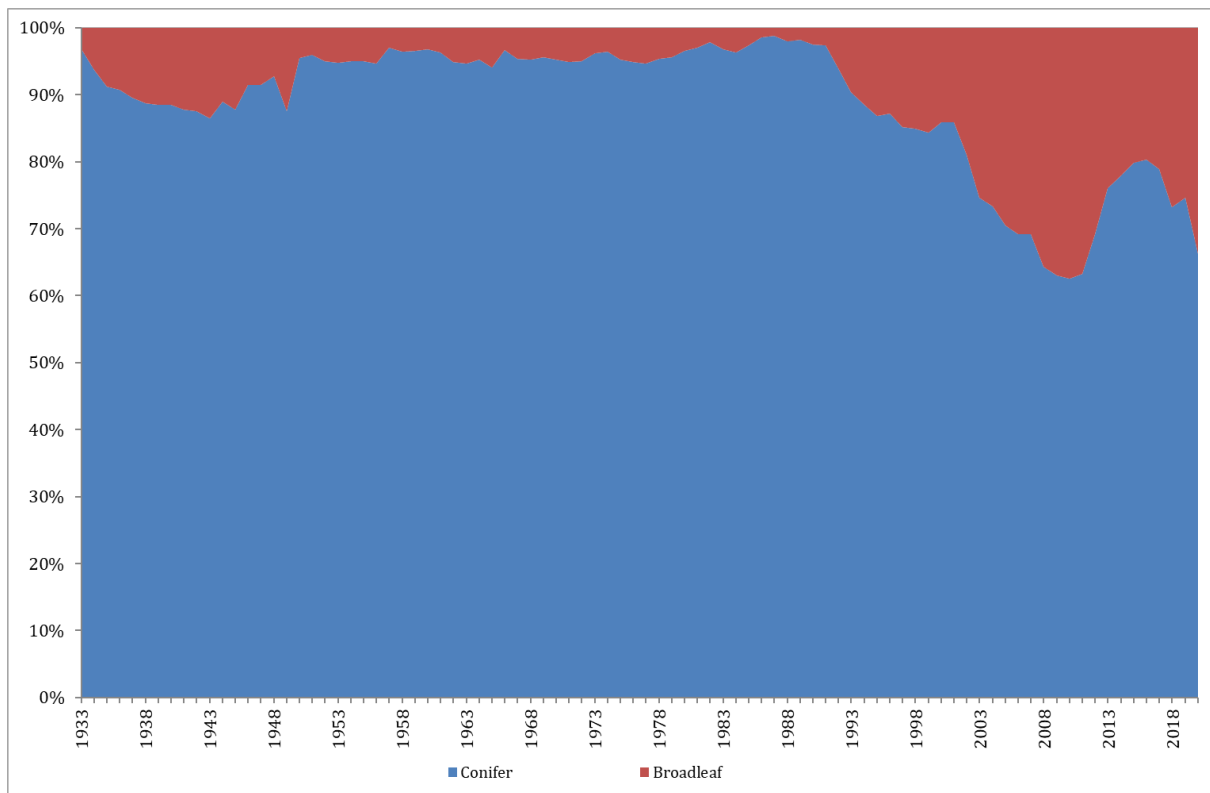


Figure 6. Conifer and broadleaf afforestation (1935-2020).

A range of conifer species were planted in the 1930's and 1940's, 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 1950's onwards, confidence in Sitka spruce and lodgepole pine grew, leading to their dominance in afforestation up to the mid-1990's, 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-1990's onwards a wider range of tree species has been planted, with ash and oak dominating broadleaf planting. However, more recently, the fungal disease *Hymenoscyphus fraxineus* (Ash Dieback) was found in ash in 2012, resulting in the cessation of grant aid for this species and a subsequent contraction in broadleaf species for afforestation from 2012 to 2016. 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.

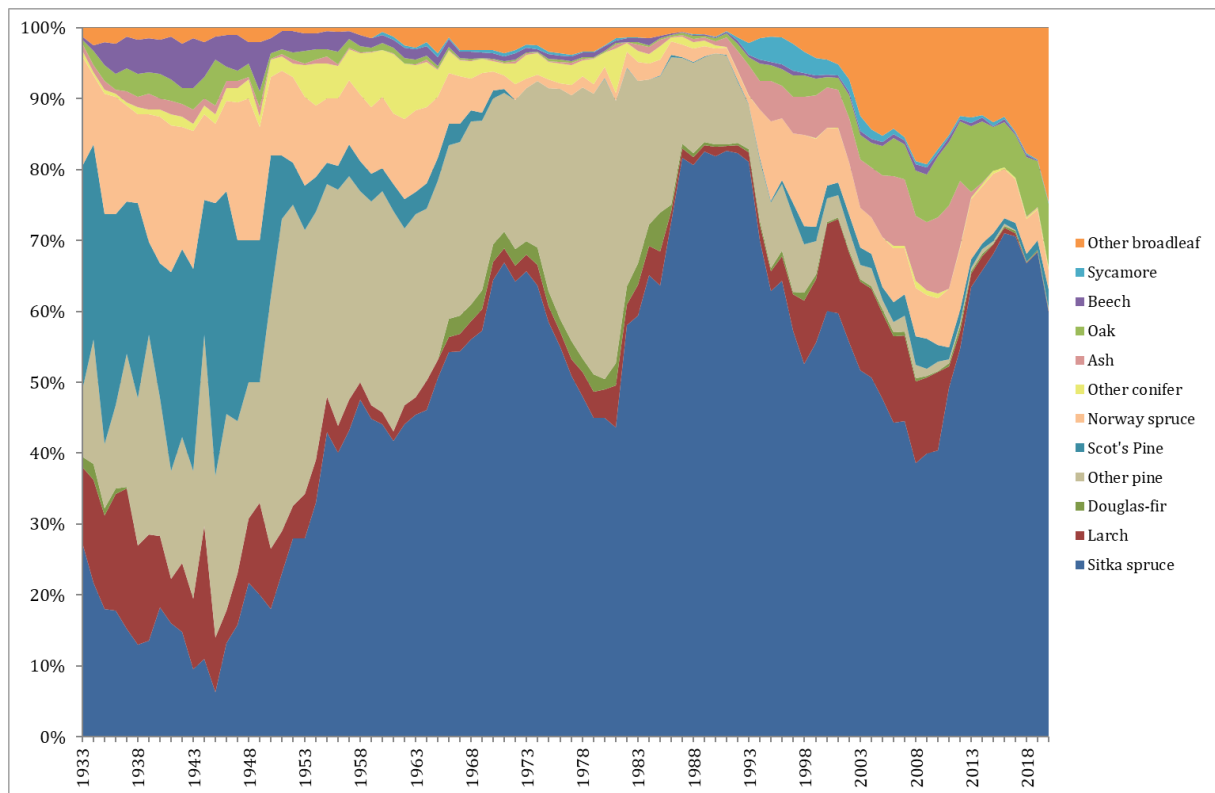


Figure 7. Species groups used in afforestation (1935-2020).

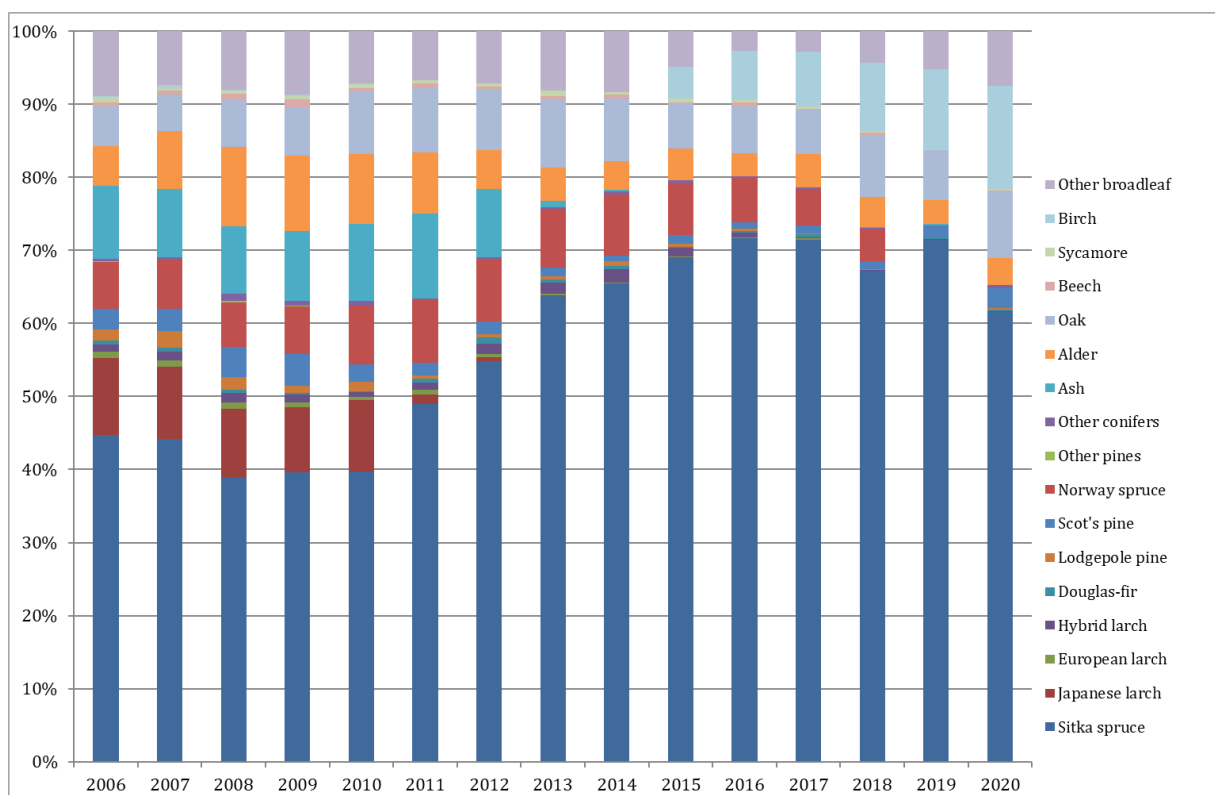


Figure 8. Grant-aided species groups (2006-2020).

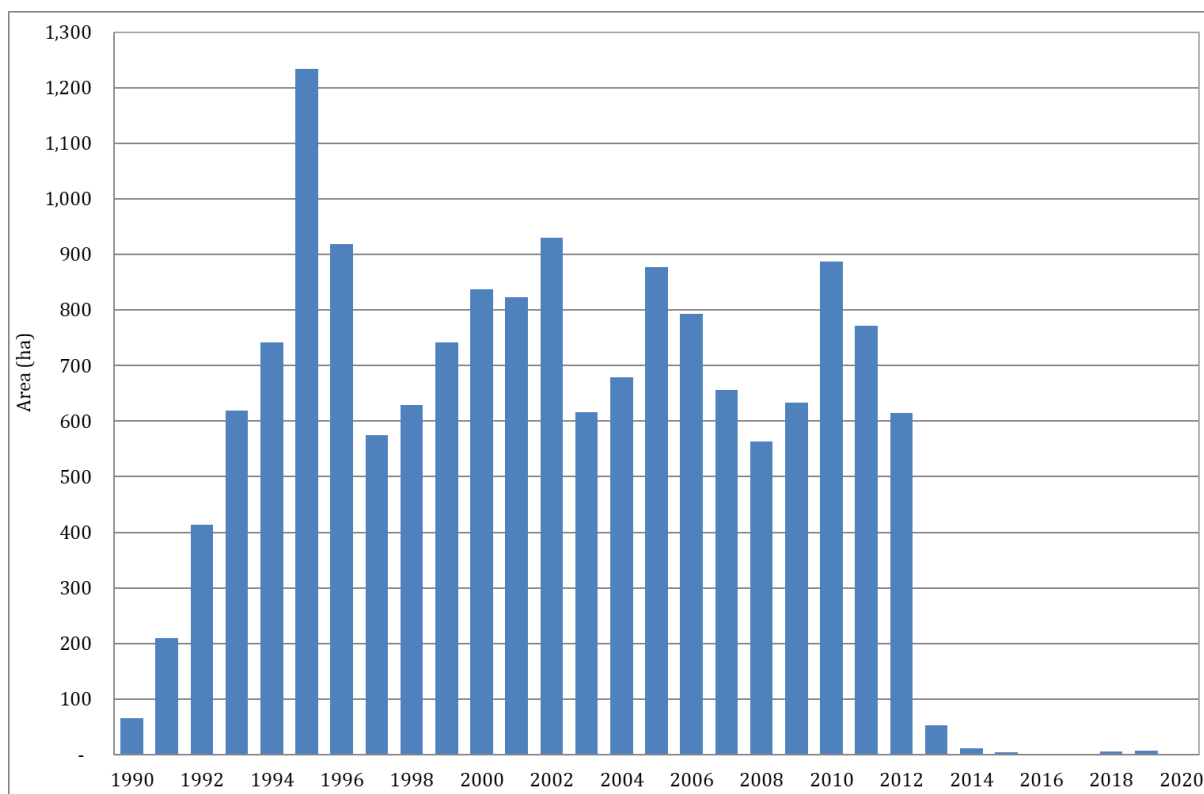


Figure 9. Extent of ash afforestation (1990-2020).

3.3 Private lands afforested, forest size and number

This section provides statistics of private lands afforested over the period 1980 to 2018. The average size of private grant-aided afforestation between 1980 and 2020 was 8.6 ha (Table 7). From 1980 up to the mid-1980's the average afforestation parcel was relatively small at 5.9 ha, but with the introduction of the grant and premium scheme average afforestation increased to 9.6 ha by the mid-1990s. By 2020 the average area afforested has decreased to 6.9 ha as a result of planting consisting of a portion of 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 1980's-late 1990's planting. The threshold for a mandatory Environmental Impact Assessment (EIA) was reduced from 200 to 70 ha in 1996. The size of afforestation parcels decreased between 1997 and 2002, with area afforested in parcels greater than 20 ha decreasing from 46% to 35%. 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 forestry application greater than 50 ha has been established. Since 2010 all afforestation applications are screened to determine whether they require an EIA, and all developments over 50 ha are subject to a mandatory Environmental Impact Statement. Presently, 32% of the total afforested area (1980-2020) consists of plantations greater than 20 ha, 63% are greater than 10 ha and 74% are greater than 7.5 ha in size.

Table 7. Size and number of individual private grant-aided afforestation (1980-2020).

Year	Number of forests		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	620	4,491	9.3	9.3
1993	1,036	5,527	8.0	9.0
1994	1,342	6,869	10.1	9.2
1995	1,467	8,336	11.1	9.6
1996	1,479	9,815	9.3	9.5
1997	1,275	11,090	9.1	9.5
1998	1,134	12,224	9.7	9.5
1999	1,141	13,365	10.3	9.6
2000	1,292	14,657	10.7	9.7
2001	1,371	16,028	10.4	9.7
2002	1,269	17,297	9.7	9.7
2003	1,132	18,429	8.6	9.7
2004	952	19,381	8.9	9.6
2005	1,343	20,724	8.3	9.5
2006	1,128	21,852	7.9	9.4
2007	836	22,688	7.1	9.4
2008	685	23,373	8.1	9.3
2009	731	24,104	8.7	9.3
2010	946	25,050	8.1	9.3
2011	893	25,943	7.4	9.2
2012	908	26,851	6.4	9.1
2013	1,008	27,859	6.6	9.0
2014	1,021	28,880	6.0	8.9
2015	929	29,809	6.5	8.8
2016	989	30,798	6.5	8.8
2017	894	31,692	6.4	8.7
2018	592	32,284	6.7	8.7
2019	451	32,735	6.9	8.6
2020	333	33,068	6.9	8.6

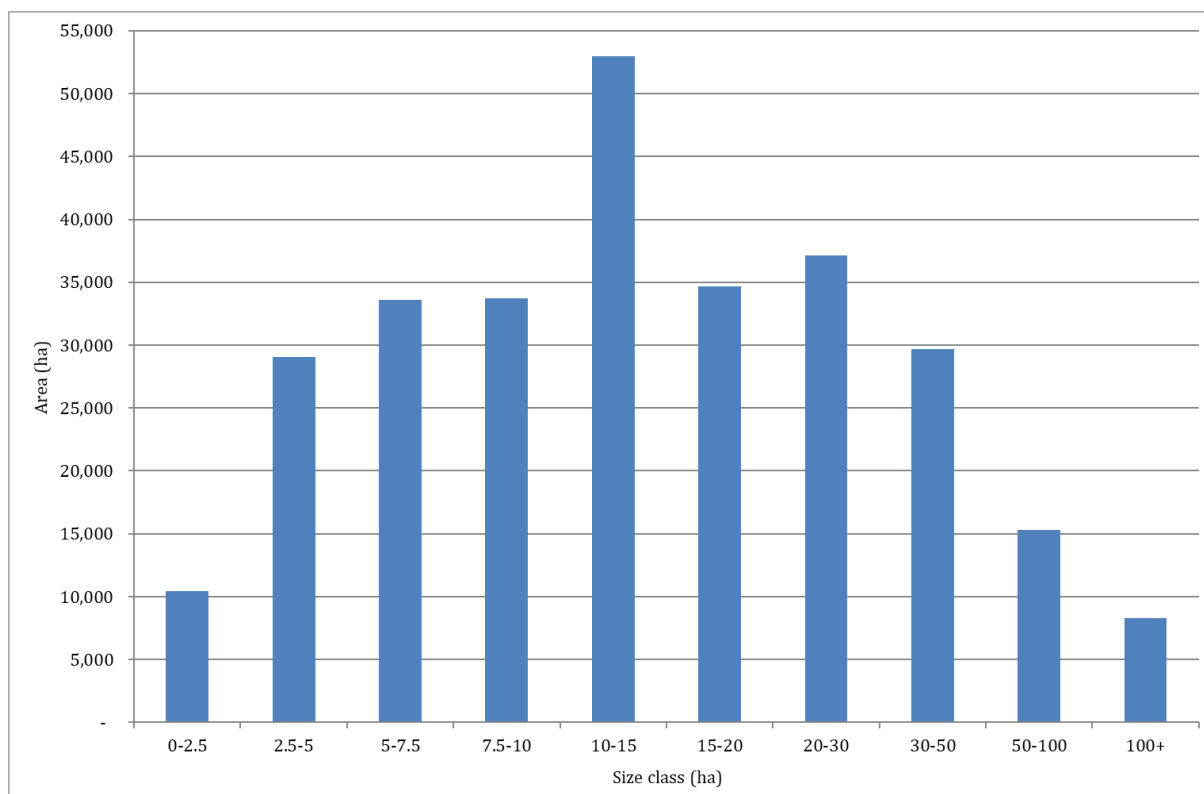


Figure 11. Size class distribution of private grant-aided afforestation (1980-2020).

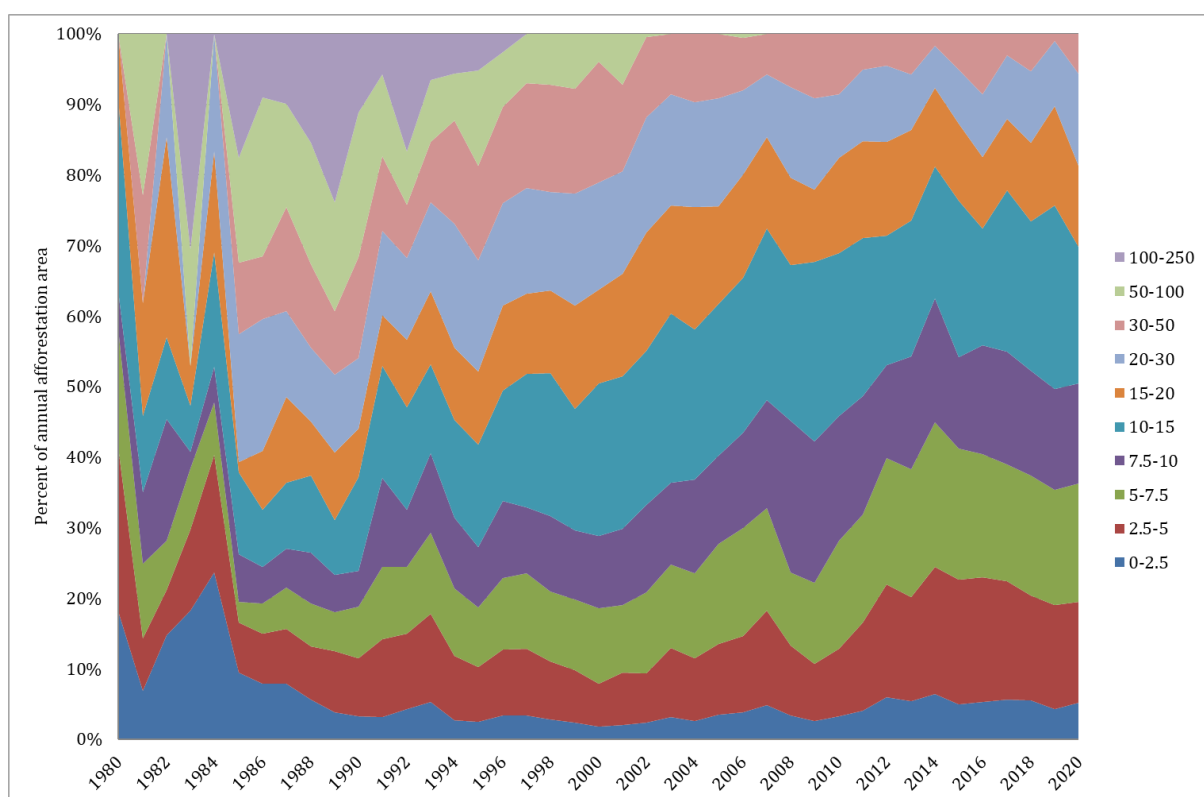


Figure 12. Proportion of annual private grant-aided afforestation area by size class (1980-2020).

3.4 Grant Premium Category

Figure 10 outlines the total area of grant-aided afforestation by Grant Premium Category (GPC). Grant and premium categories are used in the afforestation scheme to label different species and species groupings. The GPC categories are described in figure 10.

GPC 3 (Sitka spruce, plus other species) has been the most popular category, increasing from 48% in 2004 to 79% in 2016. The increase in the area of GPC 3 is in part due to the removal of ash and larch from the afforestation programme due to *Chalara* and *Phytophthora ramorum* but also due to the reduction in the area of GPC 4 been afforested. However, since 2016 the percentage of GPC 3 has declined to 70%. GPC 5 (mainly broadleaves) has historically been the second most popular category, at approximately 20% during 2004 to 2011.

Since, the introduction of distinct GPC categories for native woodland establishment in 2015 there has been a steady increase in the area of new native woodlands established. Between 2019 and 2020, there was a 10% increase in the area participating in native woodland establishment GPCs.

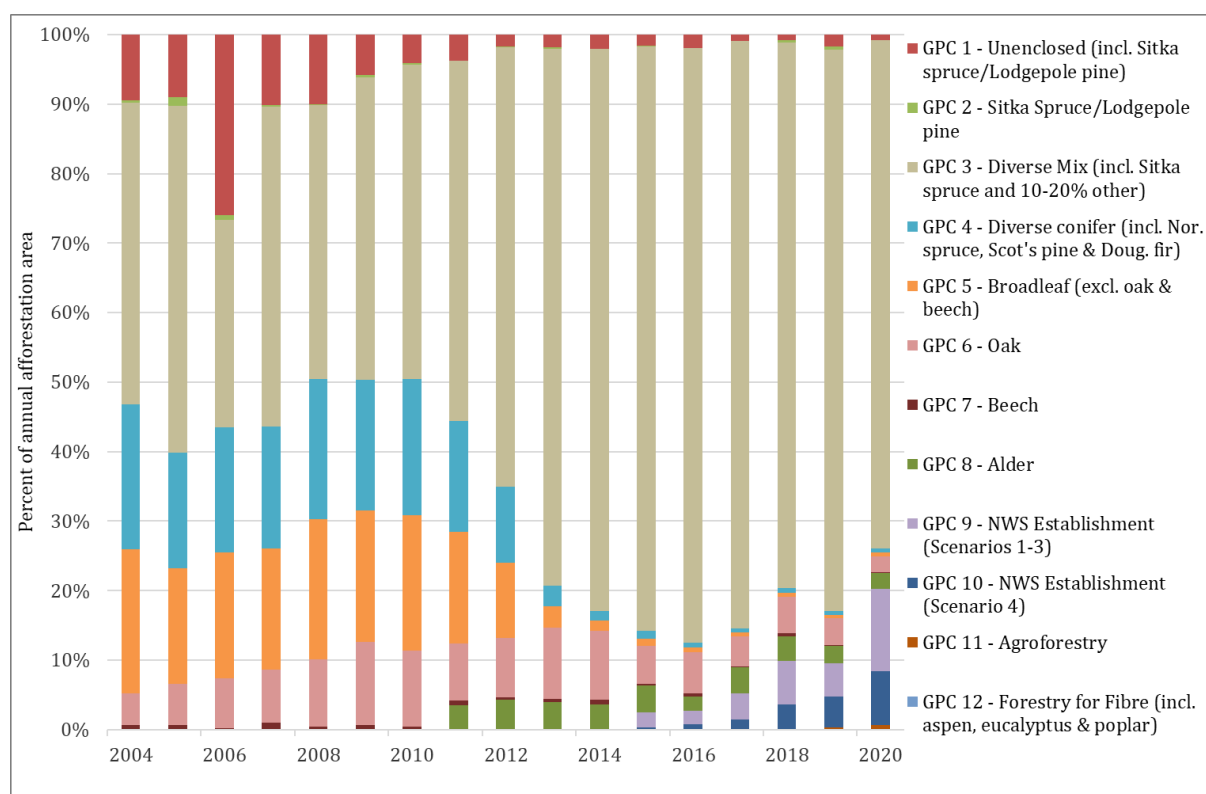


Figure 10. Proportion of annual grant-aided afforestation area by Grant Premium Categories (2004 to 2020).

3.5 Private afforestation ownership

This section provides information on the nature of private forest owners who afforested between 1980 and 2020. The data refers to the calendar year when the forest was planted.

3.5.1 Farmer/non-farmer

Farmers accounted for 81% of private lands afforested between 1980 and 2020. In the Afforestation Grant and Premium Scheme (2014-2020) changes were implemented to the differentiation of Farmers and Non-farmers in terms of premium payments. Prior to 2014 it was necessary for land owners to qualify as farmers to be eligible for an additional five premium payments. Farmers and Non-farmers are now eligible for the same duration of premium

payments. The category 'Non-farmer' includes landowners who in general are not actively farming. However, it is important to note that the non-farmer category includes; retired farmers, family members of farmers who might have inherited land but who work outside of farming and other landowners who may have recently bought the land.

A feature of the period from 1980 to 1994 was the higher average forest parcel size planted by non-farmers (15 ha), compared to an average of 5 ha for farmers (Figure 13). The differential between farmers and non-farmers reduced from 1994 to 2014, to an average of 8.7ha for farmers and 6.7ha for non-farmers. From 2015 onwards the average size of forests established by farmers and non-farmers has converged, at 6.2ha for farmers and 6.9ha for non-farmers.

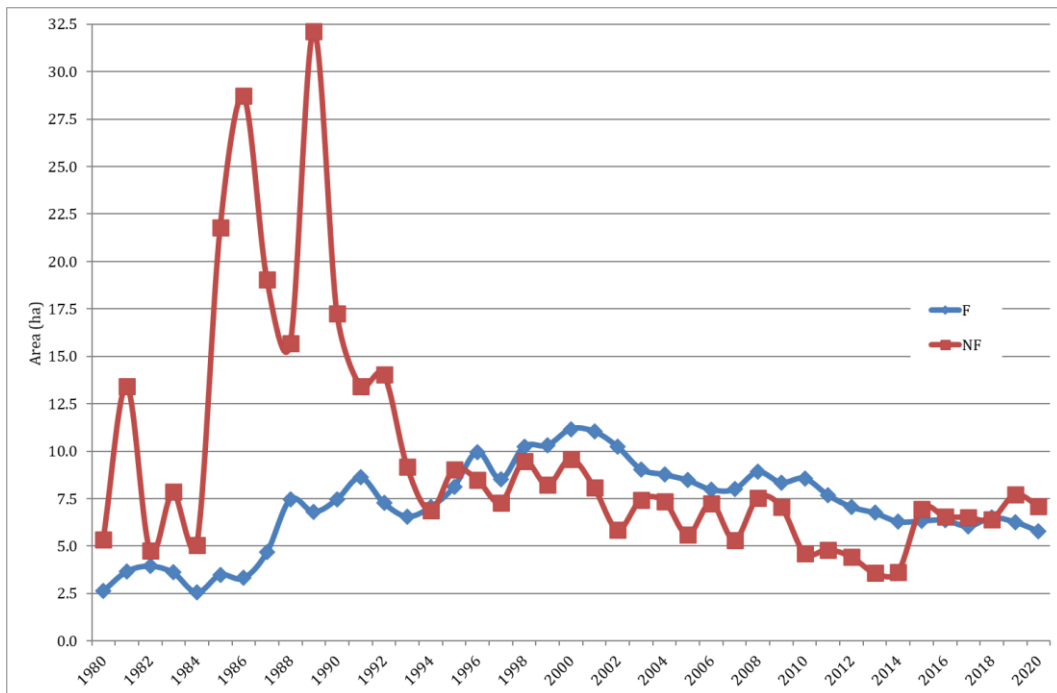


Figure 13. Average area of Farmer/Non-Farmer grant-aided afforestation (1980-2020).

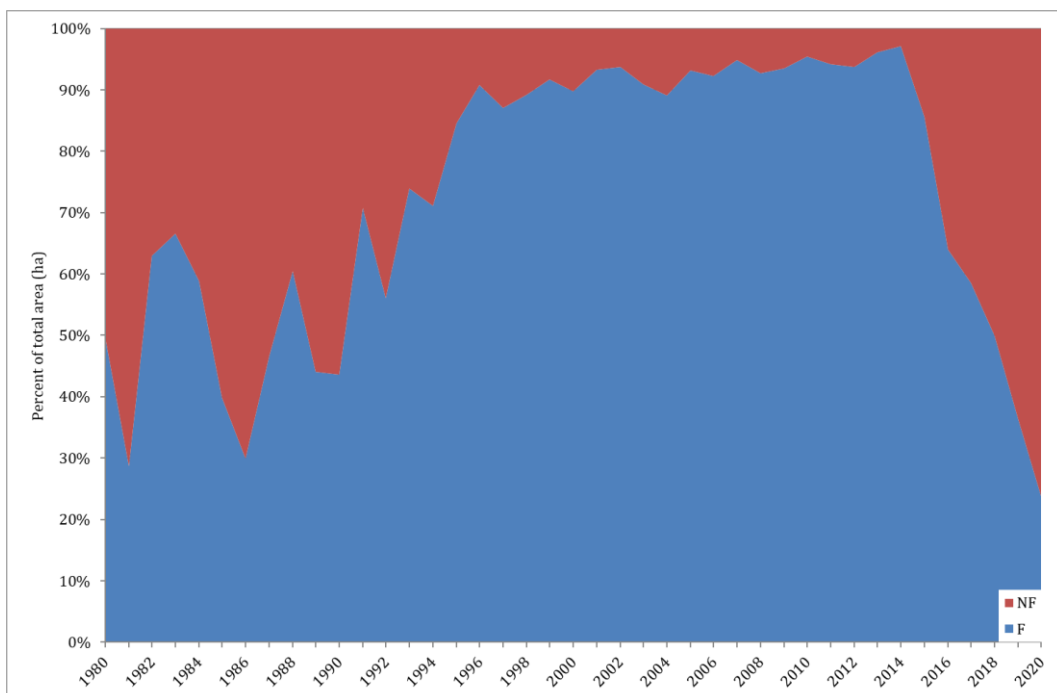


Figure 14. Farmer and Non-Farmer participation in afforestation (1980-2020).

3.5.2 Number of grant aided forests planted by individuals

It has been common for individual forest owners to afforest more than one forest. Table 8 details the number of individual forest owners who have had one or more grant aided forests planted since 1980. Some 78.7% of owners have planted one forest, accounting for 54% of the overall area. While 21% of the individual owners had two or more grant aided forests planted, these forests accounted for 46% of the area. For individual owners with one forest planted the average size is 8.3 ha, while individual owners with two or more forests planted have an average size of 26.5 ha. While these forests may not be all contiguous, the information presented shows that the private grant-aided forest estate is less fragmented than considered previously. It also shows potentially more consolidated forest holdings among individual owners than was heretofore assumed.

Table 8. Private grant aided forests planted by individual owners (1980-2020).

No. of grant applications	Individual owners		Area	
	Number	%	ha	%
1	18,486	152,563	78.7	53.6
2	3,391	54,019	14.4	19.0
3	933	23,207	4.0	8.1
4	309	11,016	1.3	3.9
5	138	7,032	0.6	2.5
6-7	111	7,534	0.5	2.6
8-9	48	4,369	0.2	1.5
10-19	49	8,754	0.2	3.1
20-49	21	8,321	0.1	2.9
50+	5	7,987	0.0	2.8
Total	23,491	284,803	100	100

The number of individual 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 individual owners and area by county in 1980-2020.

County	No. owners	Area (ha)
Carlow	230	1,870
Cavan	838	8,587
Clare	1,882	23,362
Cork	2,918	31,200
Donegal	955	15,771
Dublin	85	853
Galway	1,526	16,591
Kerry	2,181	29,756
Kildare	359	3,384
Kilkenny	852	9,611
Laois	561	7,219
Leitrim	829	12,023
Limerick	1,088	13,630

County	No. owners	Area (ha)
Longford	618	5,846
Louth	87	722
Mayo	1,774	19,929
Meath	456	4,604
Monaghan	309	2,065
Offaly	701	8,558
Roscommon	1,234	13,094
Sligo	891	9,284
Tipperary	1,502	18,913
Waterford	705	7,744
Westmeath	589	7,481
Wexford	680	5,732
Wicklow	607	6,972

3.5.3 Annual grant applications by individual 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, compared to using a simple average of afforestation areas. By 2020, the average cumulative area afforested by individual owners was 12.1 ha (Table 10), compared to the average afforestation area of 8.6 ha (Table 7). 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 10. Annual grant applications by individual owners (1980-2020).

Year	No. of individual 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	12.8	12.3
1991	764	3,058	9.5	11.8
1992	594	3,581	9.7	11.7
1993	938	4,410	8.8	11.3
1994	1,250	5,505	10.8	11.5
1995	1,355	6,627	12.0	12.0
1996	1,365	7,714	10.1	12.1
1997	1,163	8,602	10.0	12.2
1998	1,042	9,392	10.5	12.4
1999	1,037	10,187	11.3	12.5
2000	1,161	11,021	11.9	12.9
2001	1,248	11,967	11.4	13.0
2002	1,134	12,787	10.9	13.2
2003	1,005	13,467	9.6	13.2
2004	831	14,066	10.2	13.2
2005	1,186	14,911	9.4	13.2
2006	1,026	15,641	8.7	13.2
2007	759	16,174	7.8	13.1
2008	629	16,629	8.8	13.1
2009	695	17,157	9.1	13.1
2010	898	17,844	8.5	13.0
2011	860	18,531	7.7	12.9
2012	845	19,198	6.9	12.7
2013	939	19,914	7.1	12.6
2014	950	20,625	6.5	12.5
2015	863	21,267	7.0	12.4
2016	928	21,988	7.0	12.3
2017	817	22,600	7.0	12.2
2018	542	22,992	7.4	12.2
2019	393	23,274	7.9	12.1
2020	294	23,491	7.8	12.1

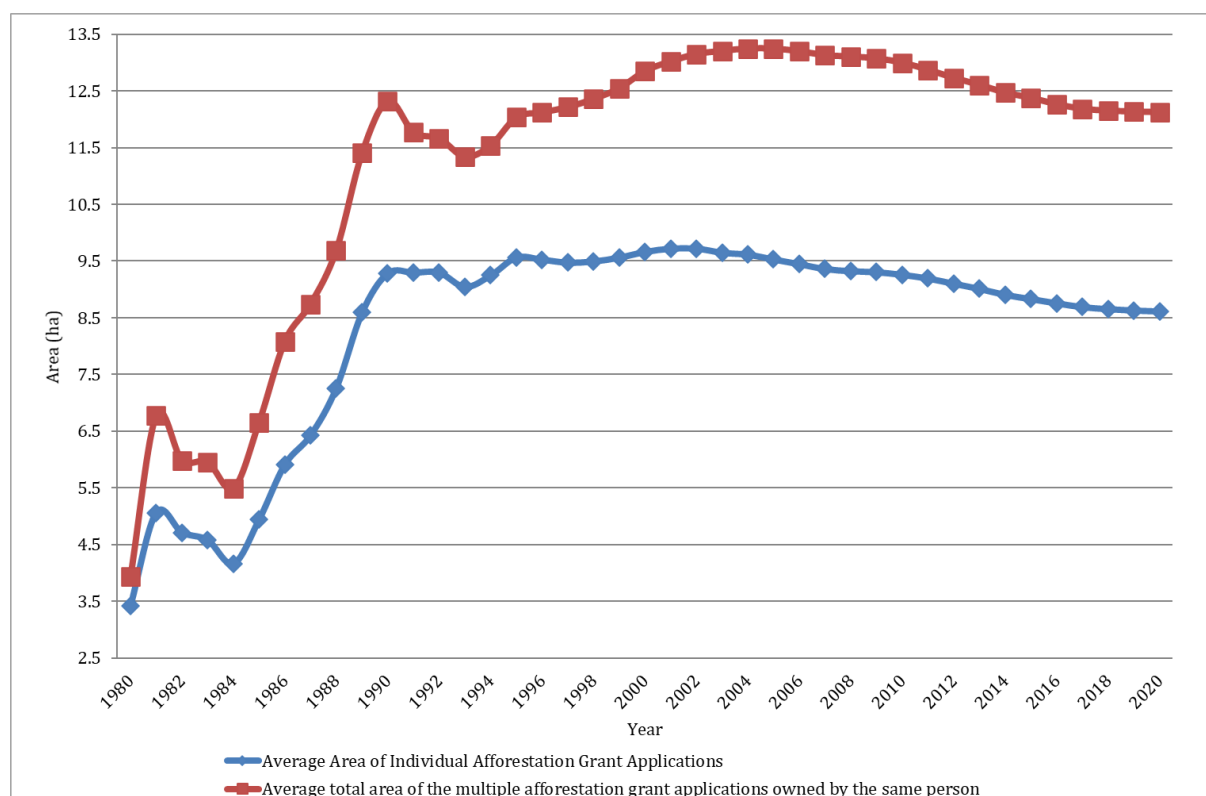


Figure 15. Average area of individual afforestation grant application vs. the average area of the combined multiple afforestation grant applications owned by the same person (1980-2020).

3.5.4 Age and gender profile of forest owners

In this section information is presented on the age and gender of forest owners. It is clear from Figure 16 that between 2006 and 2020, the age of entrants to the afforestation scheme has been increasing. In 2006, 28% of the area afforested was by people aged 60 years or more, and in 2020 this had increased to 54%.

Figure 17 details the age profile of the forest owners in receipt of premium. In 2020, 56% of the total area that received premium payments was owned by people aged 60 years or more. Over the 14-year period (2006-2020) 83% of entrants to the afforestation scheme were male (Figure 18), which is in line with participation in other agricultural schemes in Ireland (e.g. Basic Payment Scheme).

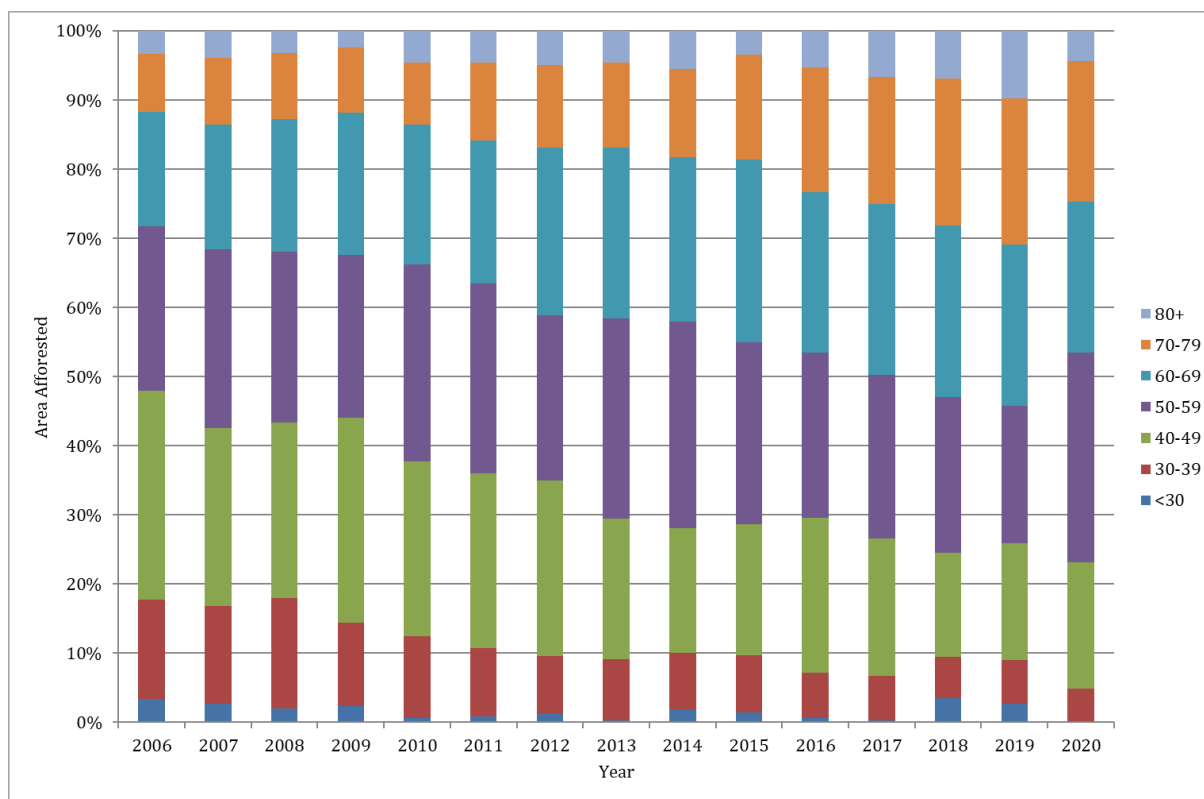


Figure 16. Age profile of forest owners at the time of when their land was afforested (2006 - 2020).

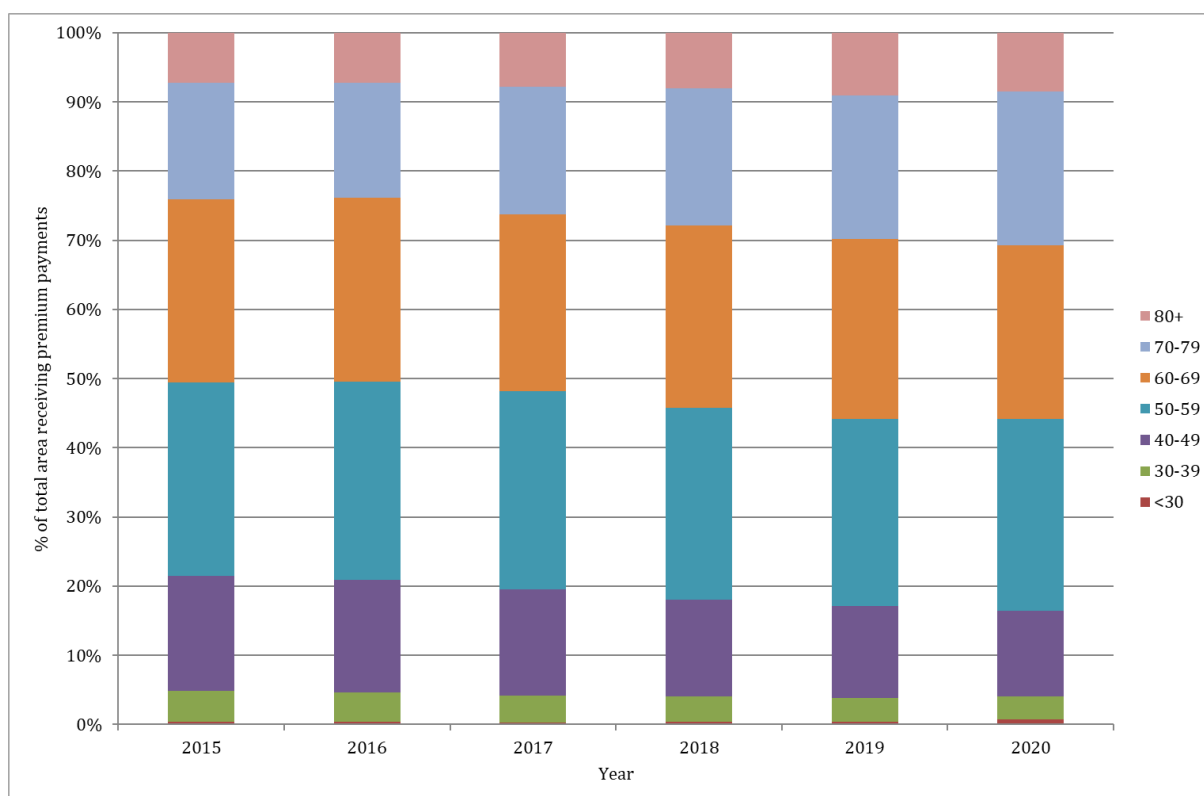


Figure 17. Age profile of forest premium recipients (2015-2020).

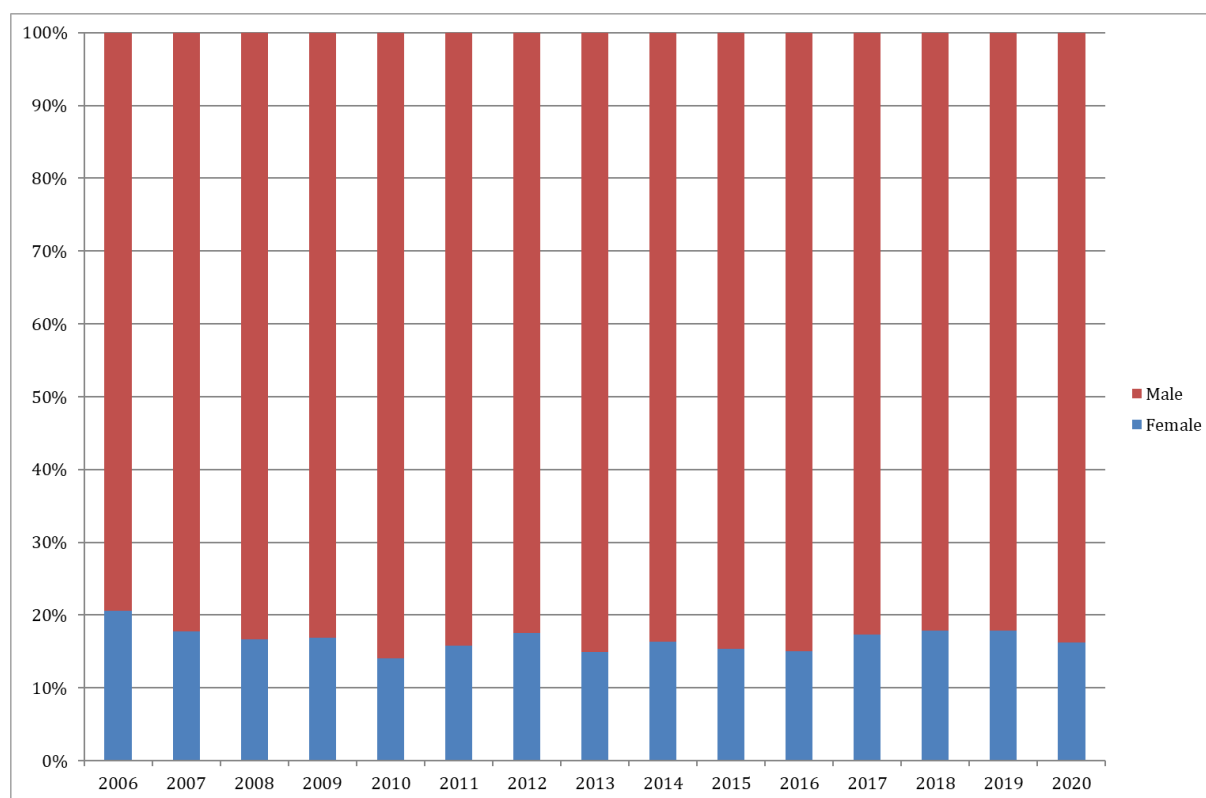


Figure 18. Gender of forest owners at the time of when land was afforested (2006-2020).

3.5.5 Private (non grant-aided) ownership details

Previous sub-sections in this chapter have outlined ownership profiles of the private grant-aided estate. Detailed information on the Private (non grant-aided) component of the forest estate is not available which comprised 110,563 ha in 2017 (NFI, 2017). The 1973 *Inventory of Private Woodlands*¹⁸ 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 (non grant-aided) 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 20,000-30,000 individuals. 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 11.

Table 11. Inventory of Private Woodlands, 1973 - 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

¹⁸ Purcell, T. 1979. *Inventory of Private Woodlands, 1973*, Department of Fisheries and Forestry, Forest and Wildlife Service.

3.6 Grant-aided forest removal

The area of private grant-aided forest removed from the afforestation scheme is shown in Table 12. The majority of these removals are for the following reasons: Public utilities (e.g. power lines) and Commercial Developments (e.g. windfarms).

Table 12. Grant aided forest removal.

Year	Number	Area (ha)	Mean Area (ha)
2007	47	67	1.4
2008	101	209	2.1
2009	110	147	1.3
2010	74	99	1.3
2011	68	87	1.3
2012	75	91	1.2
2013	63	70	1.1
2014	52	64	1.2
2015	13	36	2.7
2016	47	156	3.3
2017	40	101	2.5
2018	34	83	2.4
2019	19	39	2.0
2020	19	35	1.8

3.7 Change of applicant

A substantial area of private grant-aided forests change ownership each year (Table 13). Most ownership change is within families from one generation to the next. All forest transfers are not reported, only those interact with DAFM regarding grant or annual premium payments.

Table 13. Change of applicant.

Year	Number	Area	Mean Area (ha)
2007	345	3,385	9.8
2008	348	3,309	9.5
2009	374	3,850	10.3
2010	393	3,612	9.2
2011	335	2,970	8.9
2012	402	3,999	9.9
2013	379	3,440	9.1
2014	366	3,911	10.7
2015	362	3,503	9.7
2016	543	5,453	10.0
2017	395	3,350	8.5
2018	335	2,915	8.7
2019	404	3,722	9.2
2020	293	2,241	7.6

3.8 County level statistics

The total afforestation by county for the last 20 years is detailed in Table 14. In 2020, Cork had the highest afforestation area at 293ha followed by Kerry at 289ha. County level statistics detailing private and public afforestation are detailed in Tables 15 and 16, respectively. In Table 17, information is presented on the area afforested in each county by Farmers and Non-farmers. County level species composition details (i.e. broadleaf/conifer) is presented in Table 18.

Table 14. Total Afforestation (ha) by County (2001-2020).

County	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Carlow	71	81	79	54	88	60	43	49	47	100	21	73	44	15	82	46	62	26	22	6
Cavan	555	716	220	436	303	217	300	197	260	243	204	171	210	241	277	425	317	321	167	185
Clare	1,504	1,012	590	833	749	698	669	695	564	521	484	480	347	420	568	552	518	262	352	168
Cork	1,709	2,094	978	1,434	1,734	1,441	1,024	1,006	799	1,157	1,035	1,041	672	690	663	608	420	297	423	293
Donegal	1,016	900	388	309	345	239	321	197	172	147	59	96	40	28	72	36	54	64	45	40
Dublin	4	5	19	11	-	-	18	11	-	-	1	20	-	12	8	3	11	4	35	13
Galway	454	660	452	527	499	372	403	263	318	561	300	336	419	387	432	331	400	287	279	96
Kerry	2,018	1,825	930	893	770	664	549	478	556	736	641	366	490	574	430	405	378	332	301	289
Kildare	136	154	134	84	129	84	79	17	111	86	141	220	48	90	29	13	33	79	25	32
Kilkenny	530	529	456	297	545	322	229	199	203	523	292	294	218	231	264	181	90	136	89	21
Laois	441	476	148	183	203	71	144	178	100	178	95	193	112	168	198	163	99	71	49	26
Leitrim	464	467	325	394	411	227	191	167	179	176	325	278	356	272	513	434	536	299	289	160
Limerick	1,183	1,175	807	767	684	521	373	441	329	411	381	281	243	122	177	329	99	81	156	66
Longford	175	416	212	255	208	255	124	86	87	243	174	178	255	225	286	272	201	171	62	124
Louth	2	63	8	18	2	20	55	65	65	46	19	51	26	-	22	40	22	10	1	2
Mayo	924	929	556	483	359	325	402	344	474	548	289	293	346	453	455	429	532	256	239	208
Meath	250	169	149	150	217	287	42	89	130	252	90	203	192	67	73	105	122	106	51	33
Monaghan	48	47	59	74	59	107	70	56	88	140	70	107	93	137	38	89	61	87	59	31
Offaly	509	309	386	316	262	218	135	242	324	279	268	263	174	128	156	136	166	72	76	38
Roscommon	577	503	462	575	287	322	309	352	398	360	311	252	431	449	343	435	431	399	315	273
Sligo	524	315	242	237	254	172	205	132	233	82	87	180	354	382	268	302	190	139	119	106
Tipperary	1,195	893	710	633	1,087	663	546	465	455	532	494	486	410	330	341	305	162	128	158	12
Waterford	129	482	231	220	239	308	310	156	245	264	204	128	138	122	125	240	163	43	49	46
Westmeath	332	276	209	320	351	155	141	145	200	203	251	271	241	236	204	281	207	175	77	45
Wexford	289	158	225	187	247	216	178	102	182	426	308	201	229	160	128	89	114	60	59	77
Wicklow	426	402	122	48	65	71	89	115	128	100	109	188	164	219	139	251	148	121	49	46
Total	15,464	15,054	9,098	9,739	10,096	8,037	6,947	6,249	6,648	8,314	6,653	6,652	6,252	6,156	6,293	6,500	5,536	4,025	3,550	2,434

Table 15. Private Afforestation (ha) by County (2001-2020).

County	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Carlow	71	81	79	54	88	60	43	49	47	100	21	73	44	15	82	46	62	26	22	6
Cavan	555	700	220	436	303	217	300	197	260	243	204	171	210	241	277	425	317	321	167	185
Clare	1,457	1,009	588	800	736	698	669	695	564	521	484	480	347	420	568	552	518	262	352	168
Cork	1,615	2,026	963	1,432	1,734	1,441	1,024	1,006	799	1,157	1,035	1,041	672	690	663	608	420	297	423	293
Donegal	931	861	388	292	330	230	321	197	172	147	59	96	40	28	72	36	54	64	45	40
Dublin	4	5	19	11	0	0	18	11	0	0	1	20	0	12	8	3	11	4	35	13
Galway	446	634	382	494	477	356	403	235	318	561	300	336	419	387	432	331	400	287	279	96
Kerry	2,018	1,825	914	893	770	664	549	478	556	736	641	366	490	574	430	405	378	332	301	289
Kildare	136	154	134	84	129	84	79	17	111	86	101	186	48	90	29	13	33	79	25	32
Kilkenny	530	529	456	297	545	322	229	197	203	523	292	294	218	231	264	181	90	136	89	21
Laois	437	464	148	183	203	71	144	178	93	178	95	193	112	168	198	163	99	71	49	26
Leitrim	447	452	319	388	411	227	191	167	179	176	325	278	356	272	513	434	536	299	289	160
Limerick	1,183	1,175	807	763	684	521	373	441	329	411	381	281	243	122	177	329	99	81	156	66
Longford	168	405	212	255	208	255	124	86	87	243	174	178	255	225	286	272	201	171	62	124
Louth	2	63	8	18	2	20	55	65	65	46	19	51	26	0	22	40	22	10	1	2
Mayo	905	904	554	483	359	325	402	344	474	544	289	293	343	453	455	429	532	256	239	208
Meath	242	169	149	150	217	287	42	89	130	252	90	203	192	67	73	105	122	106	51	33
Monaghan	48	47	59	74	59	107	70	56	88	140	70	107	93	137	38	89	61	87	59	31
Offaly	509	309	386	316	262	218	135	242	324	279	268	263	174	128	156	136	166	72	76	38
Roscommon	550	437	451	559	272	322	309	315	370	360	288	252	431	449	334	435	431	399	315	273
Sligo	524	305	242	226	254	172	205	132	233	82	87	180	354	382	268	302	190	139	119	106
Tipperary	1,195	868	710	633	1,087	663	546	465	455	532	494	460	410	330	341	305	162	128	158	12
Waterford	127	482	231	220	239	308	310	156	245	264	204	128	138	122	125	240	163	43	49	46
Westmeath	332	276	209	320	351	155	141	145	200	203	251	271	241	236	204	281	207	175	77	45
Wexford	289	158	225	187	247	216	178	102	182	426	308	201	229	160	128	89	114	60	59	77
Wicklow	426	398	116	48	65	71	89	115	128	100	109	188	164	219	139	251	148	121	49	46
Total	15,147	14,735	8,969	9,617	10,032	8,011	6,947	6,182	6,613	8,310	6,591	6,592	6,249	6,156	6,284	6,500	5,536	4,025	3,550	2,434

Table 16. Public Afforestation (ha) by County (2001-2020).

COUNTY	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Carlow	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Cavan	-	16	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Clare	46	3	2	34	13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Cork	93	68	15	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Donegal	85	40	-	17	14	9	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Dublin	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Galway	8	26	69	33	22	16	-	28	-	-	-	-	-	-	-	-	-	-	-	-
Kerry	-	-	16	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Kildare	-	-	-	-	-	-	-	-	-	-	39	34	-	-	-	-	-	-	-	-
Kilkenny	-	-	-	-	-	-	-	2	-	-	-	-	-	-	-	-	-	-	-	-
Laois	5	11	-	-	-	-	-	-	7	-	-	-	-	-	-	-	-	-	-	-
Leitrim	17	15	6	6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Limerick	-	-	-	4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Longford	7	11	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Louth	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mayo	19	24	3	-	-	-	-	-	-	4	-	-	3	-	-	-	-	-	-	-
Meath	8	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Monaghan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Offaly	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Roscommon	27	66	11	16	15	-	-	37	28	-	23	-	-	-	9	-	-	-	-	-
Sligo	-	10	-	10	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tipperary	-	25	-	-	-	-	-	-	-	-	-	26	-	-	-	-	-	-	-	-
Waterford	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Westmeath	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Wexford	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Wicklow	-	4	6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL	316	319	128	122	64	25	-	67	35	4	62	60	3	-	9	-	-	-	-	-

Table 17. Total Afforestation (ha) by County and Farmer/Non-farmer (2015-2020).

County	2015				2016				2017				2018				2019				2020			
	Farmer		Non Farmer		Farmer		Non Farmer		Farmer		Non Farmer		Farmer		Non Farmer		Farmer		Non Farmer		Farmer		Non Farmer	
	No.	ha	No.	ha	No.	ha	No.	ha	No.	ha	No.	ha	No.	ha	No.	ha	No.	Ha	No.	ha	No.	Ha	No.	ha
Carlow	9	82	-	-	5	17	4	28	8	46	2	16	5	22	1	4	2	21	1	1	1	4	1	2
Cavan	42	218	11	59	33	213	26	212	27	188	21	129	18	108	24	213	12	88	17	80	4	24	24	161
Clare	85	498	8	70	60	314	33	238	38	259	40	259	21	101	28	161	11	61	35	291	3	23	14	145
Cork	95	589	11	74	49	354	34	254	38	206	28	214	16	144	19	153	13	88	29	335	5	39	27	253
Donegal	10	47	5	25	6	28	2	8	4	28	4	26	4	15	5	49	2	4	6	40	1	6	5	33
Dublin	1	5	1	3	1	3	-	-	1	3	2	7	1	4	0	0	2	35	0	0	1	13	-	-
Galway	62	387	7	45	49	242	17	89	35	235	24	165	25	185	24	101	16	113	17	166	6	28	12	68
Kerry	48	359	10	72	51	285	20	120	29	164	31	214	20	175	22	158	18	132	30	169	5	20	39	269
Kildare	3	20	2	9	2	8	3	6	5	22	3	11	6	59	4	20	3	10	4	14	1	7	4	25
Kilkenny	38	208	4	56	19	132	7	49	16	89	1	1	16	121	3	15	12	69	6	20	4	18	2	2
Laois	11	173	2	26	15	111	11	52	7	62	7	36	7	46	4	25	3	14	3	35	1	5	2	21
Leitrim	58	416	10	97	34	239	28	195	37	271	33	266	14	117	27	182	7	42	25	248	11	75	9	84
Limerick	26	163	4	14	35	219	14	110	14	64	7	36	4	29	9	52	5	31	13	125	2	14	5	51
Longford	37	215	6	71	26	144	15	128	30	150	10	50	20	81	12	90	5	26	6	36	6	36	12	88
Louth	2	4	2	19	2	12	4	28	4	22	0	0	2	9	1	1	1	1	0	0	-	-	1	2
Mayo	72	424	8	31	53	316	22	113	51	252	33	280	24	98	33	158	10	70	28	169	5	22	30	187
Meath	12	60	2	13	11	64	9	41	9	60	12	62	9	62	5	44	5	36	4	16	-	-	6	33
Monaghan	8	24	2	14	9	46	6	43	4	39	5	23	7	37	7	50	4	37	2	23	3	12	6	18
Offaly	18	130	5	26	14	106	9	30	18	130	10	36	9	57	4	15	9	51	5	25	3	16	5	23
Roscommon	49	285	7	58	50	305	29	130	52	293	20	138	33	180	30	219	28	137	24	179	21	115	19	158
Sligo	31	233	6	35	43	200	15	102	23	116	13	74	12	67	13	72	7	38	13	81	4	21	13	85
Tipperary	49	301	8	40	19	186	13	120	10	67	17	94	8	94	6	34	11	76	8	82	1	8	2	3
Waterford	23	119	2	7	17	221	4	19	18	132	5	32	4	18	4	24	2	15	2	35	2	20	5	26
Westmeath	27	204	-	-	21	173	18	108	23	146	10	61	13	87	11	88	6	35	7	42	3	7	8	38
Wexford	23	109	4	20	14	67	5	22	20	90	8	24	4	32	5	29	5	36	5	23	3	32	6	46
Wicklow	13	118	3	21	14	151	9	99	15	108	7	40	7	60	14	61	7	27	3	22	4	14	4	32
Total	852	5,389	130	904	652	4,156	357	2,344	536	3242	353	2,294	309	2,009	315	2,016	206	1,292	293	2,258	100	579	261	1,855

Table 18. Total Afforestation (ha) by County and Broadleaf/Conifer (2011-2020).

County	2011		2012		2013		2014		2015		2016		2017		2018		2019		2020	
	B'leaf	Conifer	B'leaf	Conifer	B'leaf	Conifer	B'leaf	Conifer	B'leaf	Conifer	B'leaf	Conifer	B'leaf	Conifer	B'leaf	Conifer	B'leaf	Conifer	B'leaf	Conifer
Carlow	4	17	23	50	14	31	3	12	19	63	14	32	13	50	12	13	6	16	5	1
Cavan	75	129	49	123	58	152	50	191	57	220	89	336	69	248	69	252	37	130	73	112
Clare	154	331	91	390	58	289	65	354	106	461	73	479	64	455	69	193	61	292	41	127
Cork	469	566	345	696	185	487	182	508	148	515	111	497	82	338	70	227	99	325	122	171
Donegal	23	37	17	79	10	30	4	24	10	62	7	29	15	40	11	53	20	24	13	27
Dublin	1	0	9	11	0	0	2	10	2	7	1	1	4	7	1	4	5	30	2	12
Galway	128	172	109	228	93	326	103	283	115	317	56	275	92	308	91	196	64	215	27	69
Kerry	224	417	95	271	115	375	105	470	104	327	114	291	131	247	155	177	104	197	115	174
Kildare	54	87	91	129	27	21	49	41	5	24	4	9	23	10	25	54	13	11	26	6
Kilkenny	118	174	131	163	62	156	51	180	73	192	66	115	24	65	32	104	22	67	4	17
Laois	44	51	70	123	27	85	35	133	22	176	32	132	15	83	19	53	10	39	2	24
Leitrim	115	210	79	198	71	285	41	231	71	442	73	361	82	455	54	245	44	245	45	114
Limerick	122	259	78	203	51	192	26	96	24	152	65	263	11	89	20	61	41	116	21	44
Longford	61	113	37	141	54	201	50	175	88	198	45	227	29	172	35	136	15	47	27	97
Louth	7	13	16	35	20	7	0	0	18	5	5	35	20	2	6	4	1	0	2	-
Mayo	46	243	37	257	59	288	76	378	62	393	59	369	78	453	59	197	67	172	55	153
Meath	50	40	116	87	61	131	33	33	25	48	31	74	61	61	36	70	21	30	14	19
Monaghan	30	40	37	69	32	61	33	104	8	29	16	73	14	47	35	51	21	38	16	15
Offaly	95	173	96	167	32	142	28	100	29	127	30	106	50	115	19	53	24	53	8	31
Roscommon	59	252	56	195	67	364	69	380	60	283	82	353	75	356	84	316	63	252	76	197
Sligo	21	66	36	145	69	285	49	333	28	240	42	260	29	161	16	123	30	89	17	89
Tipperary	204	290	167	319	78	332	64	266	73	268	39	266	28	134	22	106	31	127	5	7
Waterford	89	115	39	90	25	113	36	85	26	99	36	205	25	138	9	33	7	43	17	29
Westmeath	98	152	104	167	106	136	81	155	44	160	102	179	55	152	58	117	32	45	33	13
Wexford	116	192	69	132	66	163	59	101	29	100	42	47	40	75	8	52	31	28	26	51
Wicklow	40	69	48	140	54	111	53	166	17	122	37	213	34	115	54	66	23	26	29	17
Total	2,447	4,206	2,045	4,607	1,492	4,760	1,348	4,808	1,263	5,030	1,270	5,230	1,161	4,375	1,070	2,956	893	2,657	819	1,616
Percent	37%	63%	31%	69%	24%	76%	22%	78%	20%	80%	20%	80%	21%	79%	27%	73%	25%	75%	34%	66%

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 from 1944;
- Private forest road construction from 2007;
- Felling licenses issued annually from 2010;
- Clearfell levels in State forests from 1933;
- Private sector broadleaf tending and thinning from 2009;
- The level of annual State reforestation from 1933;
- The certified forest area.

Key findings

- Since 1944 an average of 129 km of forest roads have been built annually in public forests;
- Between 2006 and 2020 an average of 90 km of private grant-aided forest roads were built annually;
- Over 9,386 ha were reforested on public lands in 2020;
- Public forest clearfelling amounted to 5,818 ha in 2020, while 13,035 ha of forest were thinned;

4.2 Forest Roads

Forest roads enhance the economic viability of forests primarily by improving access for harvesting and mobilising timber. In addition, forest roads also provide areas for the stacking of timber and for drying and chipping. 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

Between 1944 and 2020, 9,837 km of forest roads have been built in the public forest estate or on average 128 km annually (Figure 19).

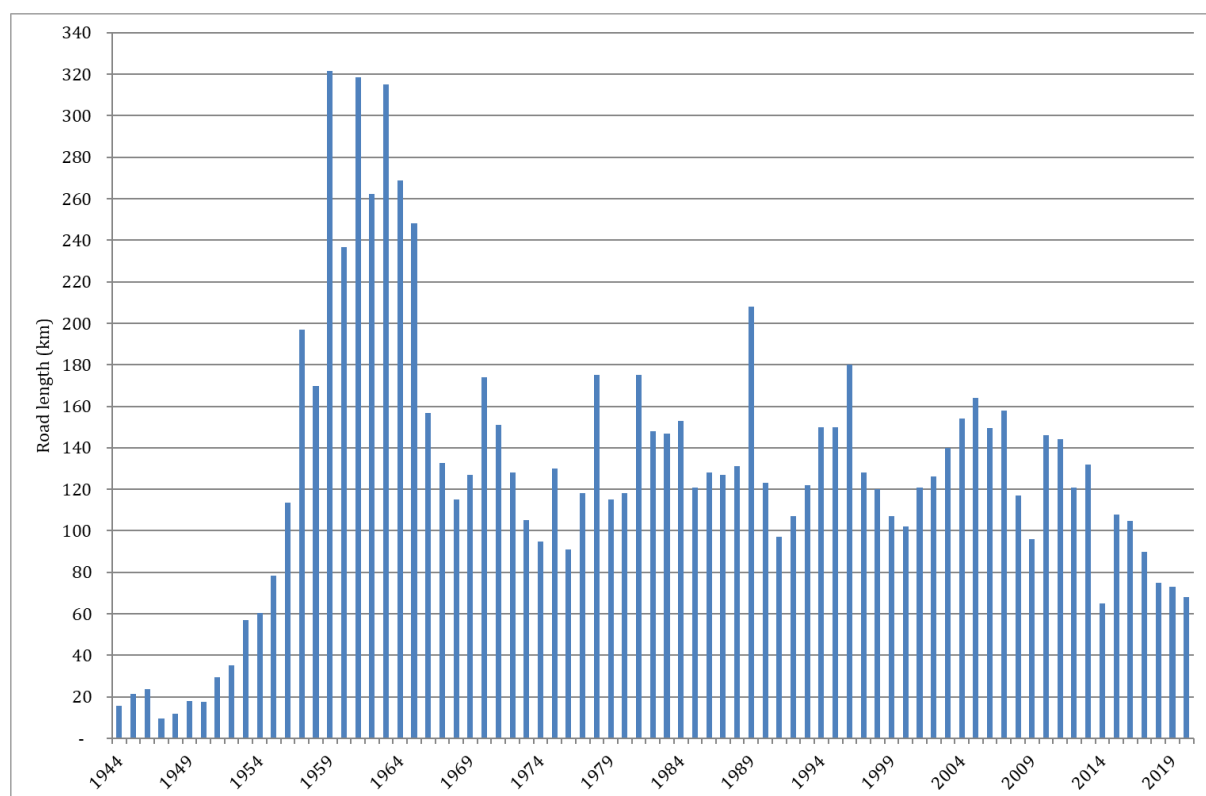


Figure 19. Forest road construction in public forests 1944–2020.

4.2.2 Private forest grant-aided roading

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 20).

Since 2006, IFORIS¹⁹ 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 2020, an average of 90 km of private grant-aided forest roads were built annually. Table 19 shows the private grant-aided forest road construction from 2010 to 2020 on a county level.

¹⁹ IFORIS is an Integrated Forest Information System which was developed for the processing of forestry pre-approval, grant and premium applications.

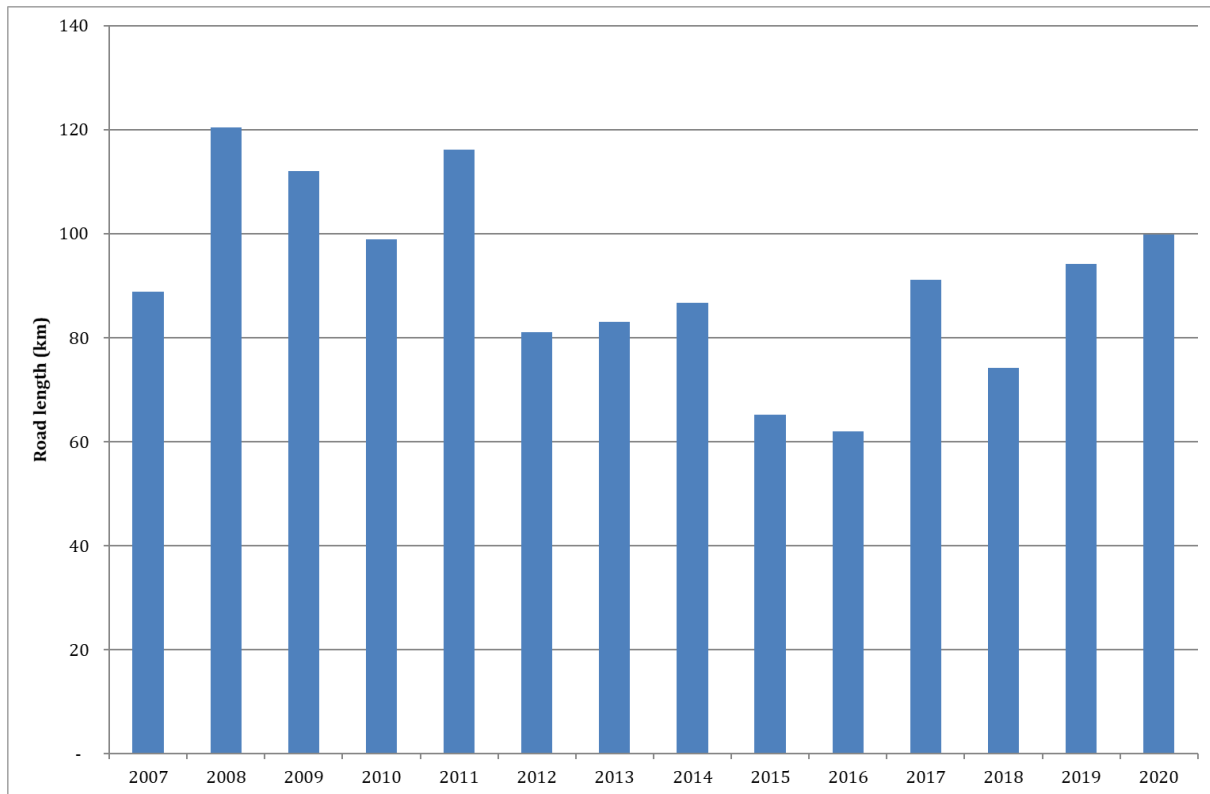


Figure 20. Private grant-aided forest road building (2007-2020).

Table 19. Private grant-aided forest road building (metres) by county from (2010-2020).

County	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Carlow	618	807	494	60	883	0	0	798	470	210	348
Cavan	6,957	2,477	1,777	2,478	3,187	3,197	1,702	2,815	4,569	7,360	6,092
Clare	5,564	5,783	3,418	4,238	2,768	5,225	4,191	5,755	4,585	3,459	4,540
Cork	7,399	13,028	11,614	6,534	8,969	8,708	5,724	8,183	7,432	10,458	8,811
Donegal	4,329	460	80	0	1,376	402	395	2,969	2,689	1,819	2,119
Dublin	900	200	0	480	800	0	0	484	1,295	868	0
Galway	6,898	7,554	3,123	2,360	4,329	895	1,047	3,365	4,301	3,303	944
Kerry	8,665	10,666	6,037	10,937	11,755	7,833	4,084	12,261	10,558	9,717	9,721
Kildare	2,796	2,790	1,158	1,324	80	2,667	430	735	420	499	1,037
Kilkenny	3,785	3,764	6,894	8,984	5,664	3,630	2,226	2,842	5,691	7,118	4,201
Laois	9,737	7,889	6,412	3,812	739	2,206	3,153	3,668	2,300	1,282	2,587
Leitrim	4,166	6,441	2,750	5,049	6,426	2,173	1,460	1,624	2,569	5,135	7,920
Limerick	5,745	5,042	3,137	6,134	4,927	1,254	3,585	4,885	3,994	4,317	6,987
Longford	475	652	2,606	552	3,116	1,845	2,080	1,228	1,570	3,623	3,511
Louth	0	1,427	787	0	0	0	435	0	0	0	0
Mayo	2,005	3,339	3,355	2,000	3,480	942	266	1,105	1,047	2,329	2,563
Meath	220	1,815	1,105	2,791	384	2,593	1,514	1,734	1,028	2,818	660
Monaghan	1,080	470	200	170	0	50	899	1,372	2,454	475	179
Offaly	1,333	10,460	1,919	1,468	2,839	1,950	1,606	4,716	2,861	674	7,323
Roscommon	4,734	10,094	5,968	2,856	4,422	1,005	917	1,573	3,048	5,614	5,496
Sligo	4,926	1,305	2,286	2,805	5,354	2,693	1,813	1,134	1,312	1,909	2,609
Tipperary	8,342	7,970	5,243	7,847	6,051	7,331	10,253	8,898	3,674	6,293	6,204
Waterford	1,635	4,522	1,099	2,266	2,649	2,362	2,636	5,139	1,086	2,366	1,219
Westmeath	2,655	1,703	3,234	2,602	3,218	2,723	6,492	5,961	2,427	4,860	6,571
Wexford	990	2,036	1,692	882	1,121	1,292	2,759	4,083	290	2,812	2,019
Wicklow	2,964	3,400	4,723	4,455	2,148	2,140	2,278	3,730	2,546	4,820	6,155
Total	98,918	116,094	81,111	83,084	86,685	65,116	61,945	91,057	74,216	94,138	99,816

4.3 *Felling Licences Issued*

A felling licence granted by the Minister for Agriculture, Food & the Marine provides authority under the Forestry Act 2014 to fell or otherwise remove a tree or trees and to thin a forest for silvicultural reasons. Table 20 shows the area of lands granted felling licences for both thinning and clearfelling.

The area issued with felling licences for thinning was on an upward trend between 2010 and 2014, and declined by approximately 4,544 ha in 2015. This figure has subsequently increased, with 14,504 ha licensed for thinning in 2018. A large increase in the area licensed for clearfell was evident in 2014 due to Storm Darwin. The clearfell area licensed in 2016 declined to 1,384 ha, which is still high when compared to pre-Storm Darwin clearfell areas. In 2018, 4,421 ha were licensed for clearfell, reflecting plantations that were established during the late 1980's and early 1990's reaching maturity.

Information is also from provided for the public estate in Table 20 on felling licences. In 2011 and 2016, large areas were licensed for thinning which represent a multi-annual thinning programme.

It should be noted that the areas licensed for thinning and clearfell are indicative and may not be fully utilised on the ground due to a variety of reasons e.g. markets, access.

Table 20. Area (ha) of felling licences issued (2010-2020).

Year	Public		Private		Total	
	Thinning	Clearfell	Thinning	Clearfell	Thinning	Clearfell
2010	3,634	10,558	10,382	439	14,016	10,996
2011	109,789	15,134	12,275	590	122,064	15,725
2012	353	3,026	13,037	467	13,390	3,493
2013	301	6,170	15,150	394	15,450	6,564
2014	272	8,566	15,742	3,447	16,014	12,012
2015	5,717	9,571	11,198	2,012	16,916	11,583
2016	137,848	8,395	16,549	1,384	154,397	9,780
2017	10,281	7,980	16,697	2,133	26,977	10,113
2018	11,184	9,736	14,504	4,421	25,688	14,157
2019	38,242	5,936	9,328	3,690	47,571	9,626
2020	1	7,145	7,604	4,725	7,605	11,870

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 20). Clearfell areas from 1986-2000 were estimated by averaging the reforestation areas for the two years following clearfell. Thinning activity in the public estate is shown in Figure 21. Thinning data for 1986-1996 are not available, but to create a complete time series an estimate of 10,065 ha has been assumed (i.e. average of a 10-year period 1981-1985 and 1997-2001).

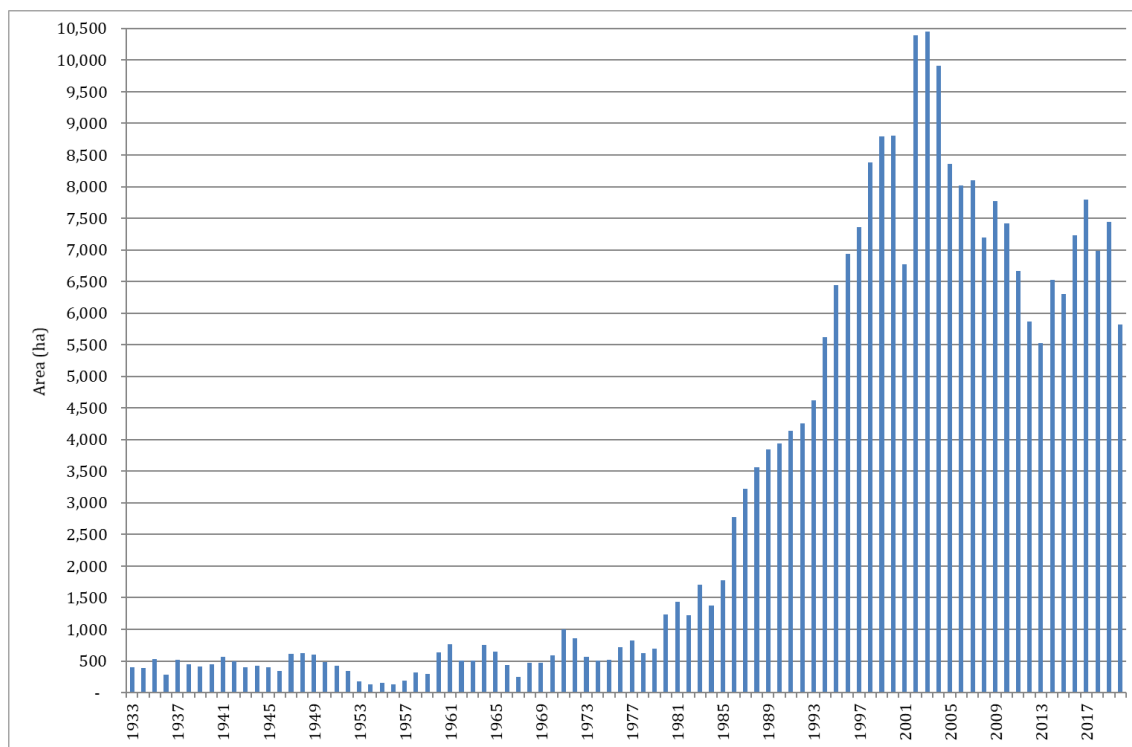


Figure 21. Public estate clearfelling 1933-2020

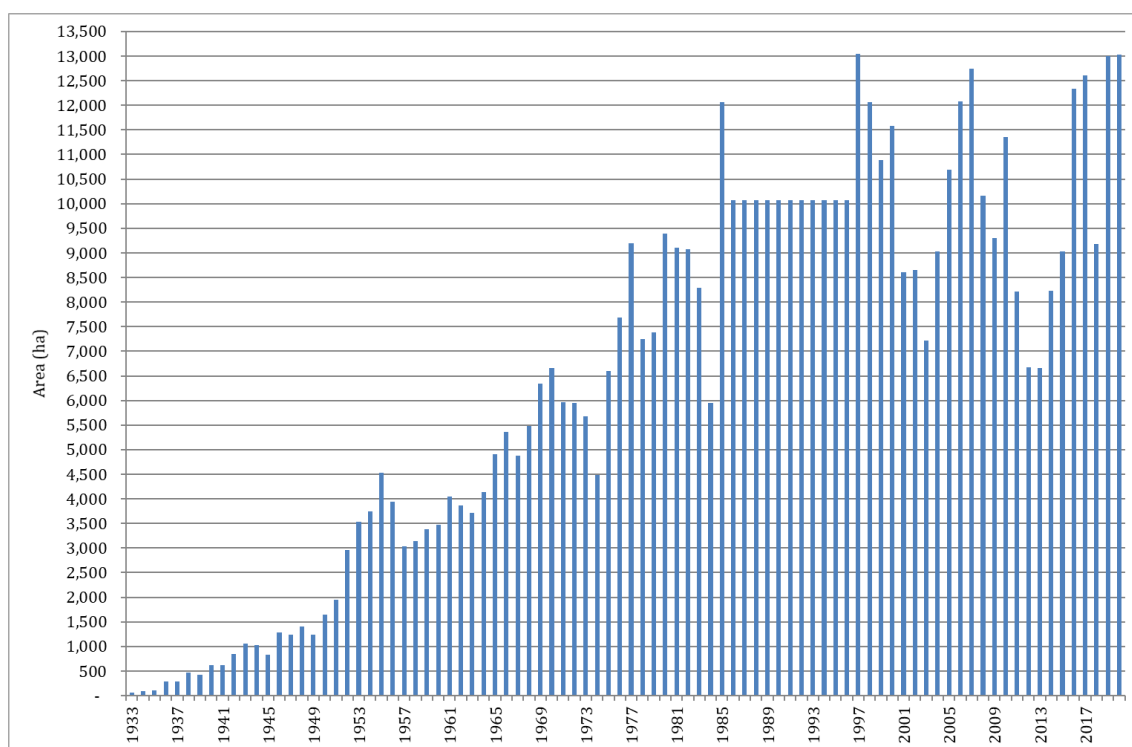


Figure 22. Public estate thinning 1933-2020.

4.5 Public forest reforestation

Reforestation is the regeneration of existing areas of forests that have been felled, and 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 2019 are shown in Figure 23. Up until the early 1980's reforestation rates were low due to relatively low afforestation up to 1950. In the 1950's and 1960's afforestation greatly expanded, which in turn was reflected in the increasing reforestation of the 1980's and 1990's. By 2008 and 2009, the area of public reforestation had fallen by about a third, since a peak of 10,000 ha in 2003. In recent years the level of reforestation has significantly increased.

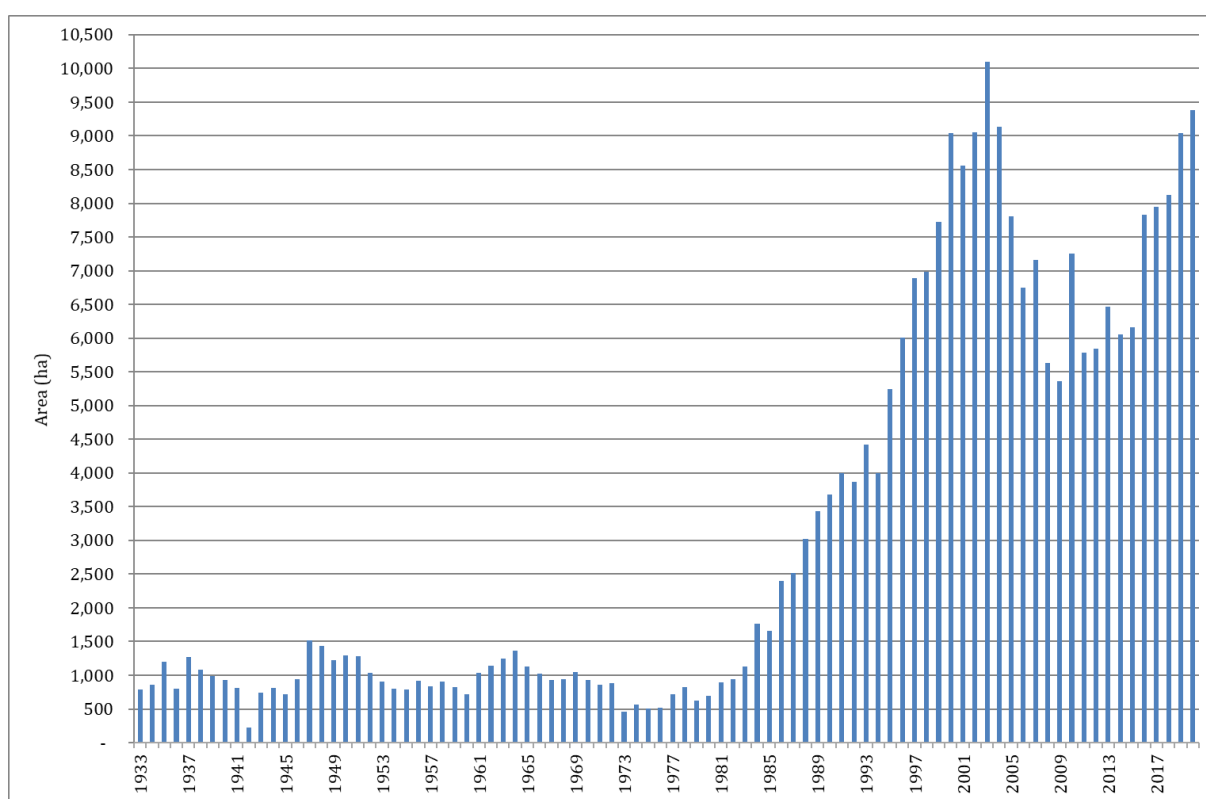


Figure 23. Public sector reforestation 1933-2020.

4.6 Broadleaf Thinning and Tending

As part of the Woodland Improvement Scheme (WIS), 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 WIS was introduced in 2009. In total 6,989 ha have received payment to be tended or thinned between 2011 and 2020 (Figure 24). Ash has been the main species grant aided. Figure 25 shows the species areas grant aided. The year presented in both charts refers to the year when works were completed.

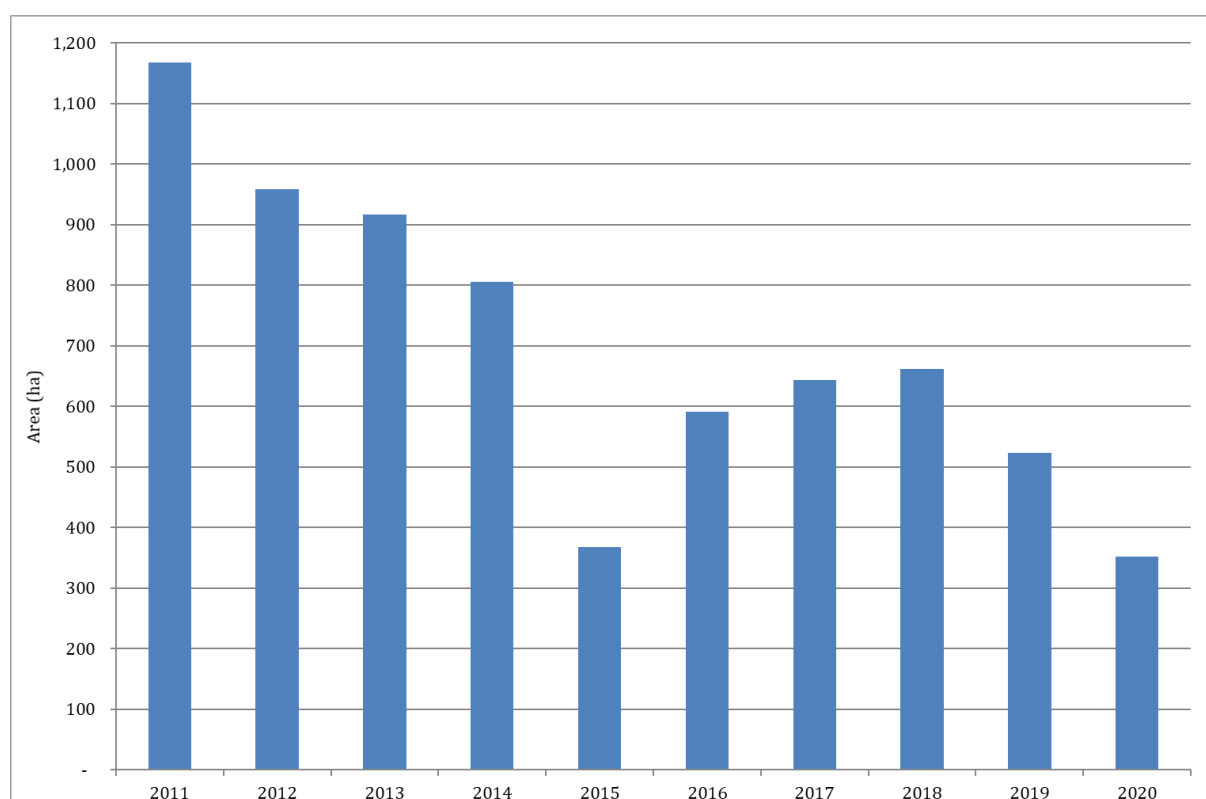


Figure 24. Total area tended and thinned under the Woodland Improvement Scheme 2011-2020.

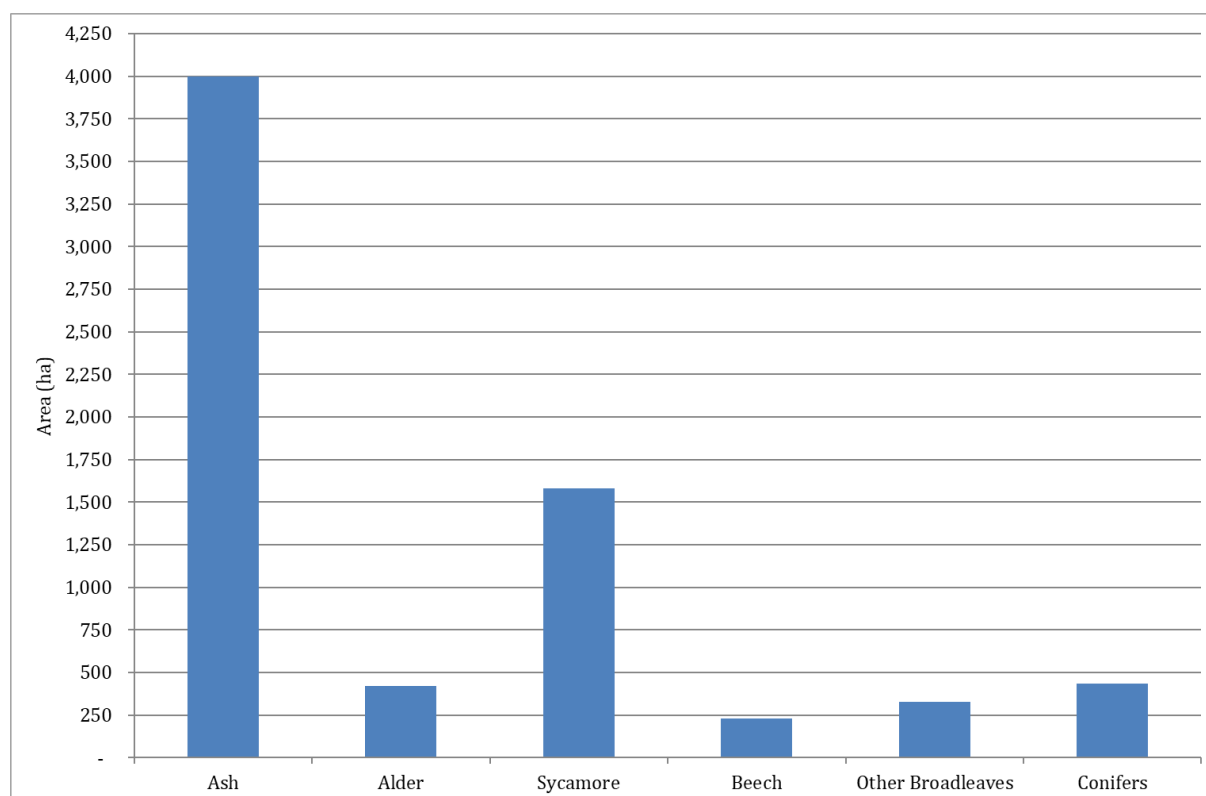


Figure 25. Species tended and thinned under the Woodland Improvement Scheme 2011-2020.

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 schemes: 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 management of the Coillte estate, which comprises 54% of the national forest estate, is certified by both the FSC and PEFC. Coillte first obtained certification in 2001 from FSC and became certified in 2014 when the company received PEFC certification.

As harvesting in the private sector increases, certification is likely to be an issue for private forest owners in the near future. Currently 11,631ha of private forest is certified; of which 4,741ha is certified by PEFC and 7,219ha by FSC. There are 330ha certified by both schemes.

5. Forest Production and Carbon

5.1 *Introduction*

This chapter provides information on:

- The annual roundwood harvest between 1955 and 2018;
- The roundwood available for processing between 2006 and 2018;
- The roundwood forecast for 2016 to 2035;
- Roundwood timber prices for both Coillte and the private sector;
- Timber and paper products trade;
- Firewood production;
- Forest based biomass usage;
- Forest carbon stocks.

Key statistics

- The total roundwood harvest in 2018 (including firewood) was 3.69 million m³, the highest level since records began;
- Softwood available for processing in 2018 was 3.24 million m³;
- 80% of the roundwood available for processing came from Coillte in 2018, with the balance coming from the private sector;
- The share of private sector roundwood available for processing has increased from 7.6% in 2006 to 26.4% in 2018, reflecting the maturing private forest estate;
- The total forecast of net realisable volume production for the Republic of Ireland over the forecast period 2016-2035 is estimated as being 107.8 million m³ overbark with an additional 4.5 million m³ potentially available in the tip - 7cm category;
- The average Coillte contracted standing sales price in 2018 was €72, up 33% from 2017;
- In 2018, exports of forest products from the Republic of Ireland were valued at €450 million, an 8.7% increase on 2017;
- In 2018, 40% of the wood fibre available for use in the Republic of Ireland was used for energy generation, mainly within the forest products sector;
- The national forest estate is an important carbon reservoir, amounting to 311.7 million tonnes of carbon in 2017;

5.2 Roundwood

5.2.1 Roundwood Harvest 1955-2018

The national roundwood harvest (excluding firewood & hardwood) from Irish forests between 1955 and 2018 is shown in Figure 26. 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 2000²².

Up until the early 1980's, roundwood harvest was low due to relatively low afforestation rates up to 1950. The early 1980's saw the opening of the Finsa and Medite board mills which increased demand for roundwood and sawmilling residues. In 2018, 3.69 million m³ of roundwood was harvested in the Republic of Ireland, the highest level since records began.

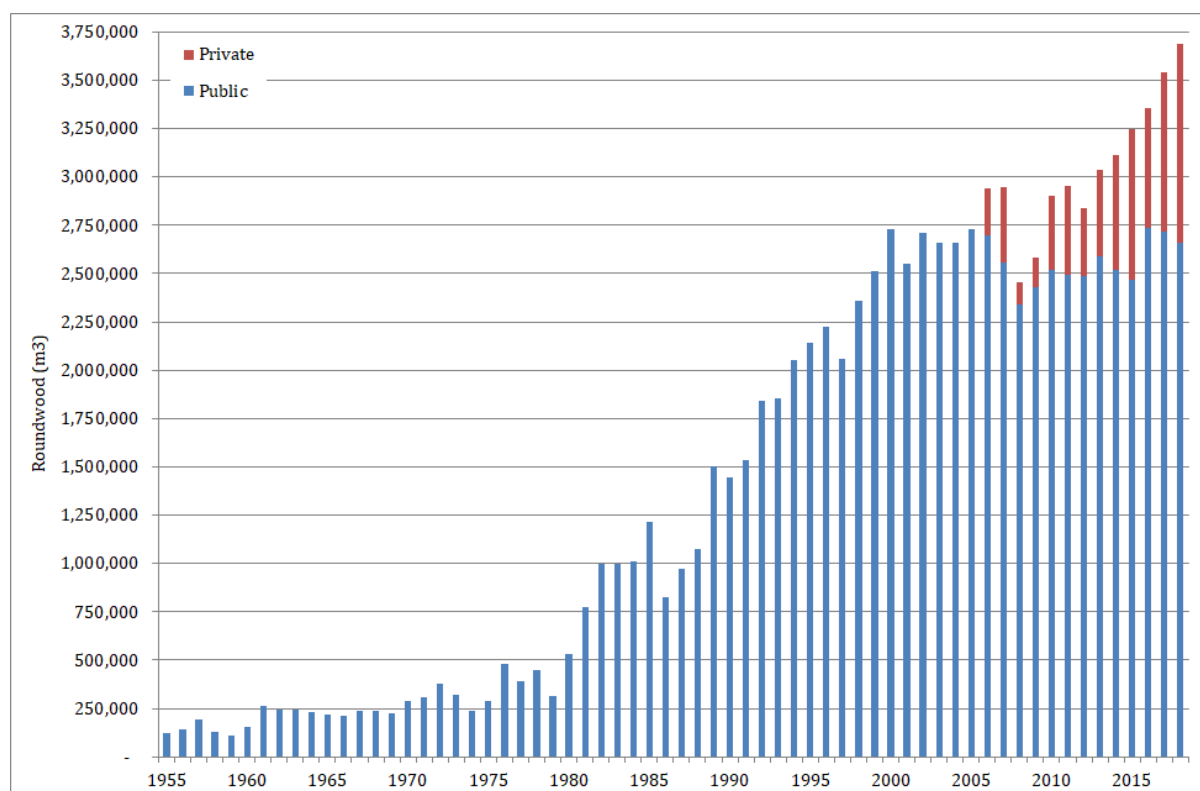


Figure 26. Roundwood harvest 1955-2018.

5.2.2 Roundwood available for processing in Ireland

The annual national roundwood available for wood processing, excluding firewood and hardwood, is shown in Table 21. 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 2018, 3.24 million m³ of roundwood was available for processing (excluding firewood) in the Republic of Ireland, a 1% increase on 2017 production. Between 2006 and 2018, roundwood production from privately owned forests averaged 426,308 m³. In 2018, 857,000m³ of roundwood came from privately owned forests, a 27% increase over the 2017 output. This is reflective of the maturing private forest estate.

²² *Forecast of Roundwood Production from the Forests of Ireland 2001-2015*, (2001). COFORD, Dublin.

Table 21. Roundwood available (commercial softwood) for processing (2006-2018).

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	106,000	2,279,000	118,000	2,503,000	1,619,000	804,000	80,000
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
2015	40,000	2,377,000	646,000	3,063,000	1,867,000	1,027,000	169,000
2016	-16,000	2,600,000	518,000	3,102,000	1,977,000	961,000	164,000
2017	-65,000	2,613,000	676,000	3,224,000	2,178,000	898,000	148,000
2018	-205,000	2,591,000	857,000	3,243,000	2,084,000	994,000	165,000

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, and the increased export market share gained by sawmills.

In 2018, 40% of the roundwood fibre available for use in the Republic of Ireland was used for energy generation, mainly within the forest products sector. Intake of sawmill roundwood was 2.08 million m³ in 2018, which was converted to 1.01 million m³ of sawn timber²³

Commercial hardwoods are still a minor element of the annual roundwood available for processing, the figure has decreased substantially between 2017 and 2018, from 18,000 m³ to 5,000 m³ (Table 22).

Table 22. Roundwood available (commercial hardwood 000 m³ overbark) for processing in the Republic of Ireland 2011-2018.

	2011	2012	2013	2014	2015	2016	2017	2018
Imports less exports	0	0	-1	0	0	0	0	0
Coillte	1	1	2	6	3	5	7	0
Private Sector	1	1	1	0	0	1	11	5

5.2.3 Roundwood Forecast

The total forecast of net realisable volume production for the Republic of Ireland over the forecast period 2016-2035 is estimated as being 107.8 million m³ overbark which includes 4.5 million m³ potentially available in the tip-7 cm category.

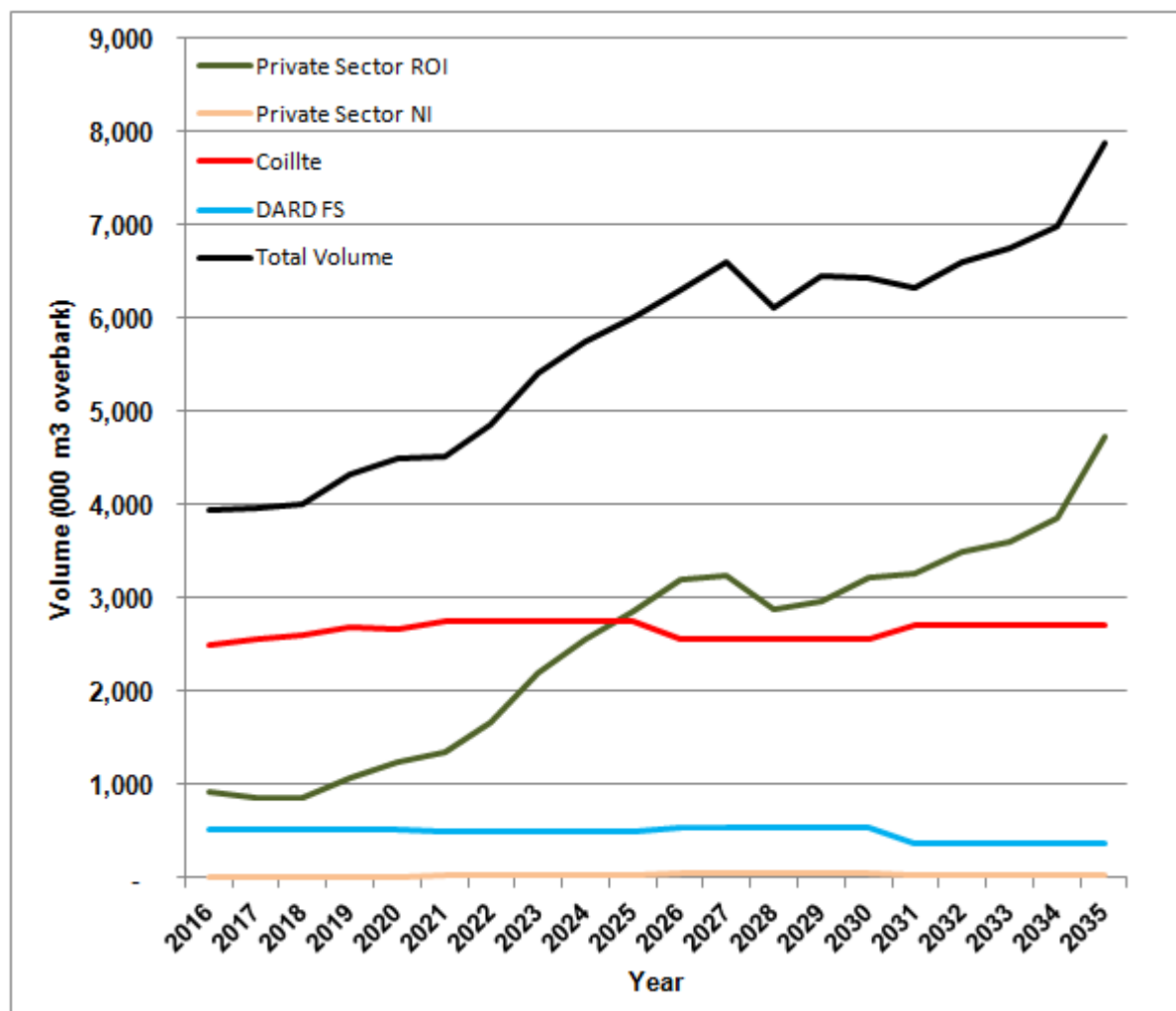
The annual forecast of net realisable volume will increase from 3.6 million m³ in 2016 to 7.6 million m³ by 2035. Table 23 displays the future sustainable harvest levels between 2016 and 2035 by assortment and ownership type. Privately owned forests will steadily increase their share of the total harvest of roundwood from 27% in 2016 to 63% in 2035²⁴.

²³ *Woodflow and forest-based biomass energy use on the island of Ireland*, 2018. COFORD, Department of Agriculture, Food and the Marine, Dublin.

²⁴ *All Ireland Roundwood Production Forecast 2016-2035*, 2016. COFORD, Department of Agriculture, Food and the Marine, Dublin.

Table 23. Forecast of potential conifer net realisable volume production by assortment category and ownership type 2016-2035 (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	
2016	60	368	219	328	976	150	548	695	1,262	2,655	3,630
2017	55	356	174	329	914	126	499	669	1,399	2,694	3,608
2018	59	375	212	281	926	149	493	757	1,362	2,762	3,688
2019	76	451	334	298	1,158	150	510	783	1,401	2,844	4,003
2020	78	473	372	401	1,324	148	481	754	1,438	2,821	4,145
2021	80	501	446	412	1,439	145	538	924	1,294	2,902	4,341
2022	91	547	560	564	1,762	145	538	924	1,294	2,902	4,663
2023	106	595	766	842	2,309	145	538	924	1,294	2,902	5,211
2024	103	595	782	1,194	2,674	145	538	924	1,294	2,902	5,576
2025	109	632	969	1,260	2,970	145	538	924	1,294	2,902	5,872
2026	117	656	1,048	1,508	3,329	124	449	764	1,347	2,684	6,013
2027	120	683	1,049	1,523	3,375	124	449	764	1,347	2,684	6,059
2028	99	560	863	1,461	2,982	124	449	764	1,347	2,684	5,667
2029	99	609	905	1,455	3,068	124	449	764	1,347	2,684	5,752
2030	110	650	1,084	1,479	3,323	124	449	764	1,347	2,684	6,007
2031	94	528	890	1,837	3,350	110	390	724	1,603	2,828	6,177
2032	99	578	1,062	1,853	3,592	110	390	724	1,603	2,828	6,419
2033	95	563	1,018	2,033	3,709	110	390	724	1,603	2,828	6,536
2034	103	609	1,104	2,151	3,967	110	390	724	1,603	2,828	6,794
2035	123	753	1,376	2,595	4,847	110	390	724	1,603	2,828	7,674
Total	1,876	11,083	15,232	23,803	51,994	2,621	9,418	15,721	28,082	55,842	107,837

**Figure 27. Forecast of total net realisable volume (2016 - 2035).**

5.2.4 Actual Harvest Vs. Forecasted

Actual and forecast harvest (net realisable volume (NRV)) for the Republic of Ireland has been compared for the period 2011 to 2018. NRV forecast data is taken from the *All-Ireland Roundwood Production Forecast (2016 - 2035)*. Actual harvest is from the COFORD Connects *Woodflow* Series. Over the period 2011 to 2018, private sector harvest was 109% of NRV forecast, while Coillte harvest was 94% of NRV forecast. Over the same period, the combined harvest (i.e. Coillte and private) was 97% of NRV forecast (Table 24).

Table 24. Actual and forecast roundwood harvest (000 m³ overbark) in the Republic of Ireland (2011-2018).

Year	2011			2012			2013			2014		
Harvest type ¹	A	F	%	A	F	%	A	F	%	A	F	%
Private	460	371	124	354	384	92	448	369	121	597	425	140
Coillte	2,492	2,979	84	2,485	2,737	91	2,588	2,798	92	2,517	2,906	87
Total	2,952	3,350	88	2,839	3,121	91	3,036	3,167	96	3,114	3,331	93

Year	2015			2016			2017			2018		
Harvest type	A	F	%	A	F	%	A	F	%	A	F	%
Private	780	504	155	622	916	68	828	859	96	1,027	868	118
Coillte	2,470	2,844	87	2,733	2,505	109	2,714	2,568	106	2,658	2,613	102
Total	3,250	3,348	97	3,355	2,421	98	3,542	3,427	103	3,685	3,481	106

Year	Total (2011-2018)		
Harvest type	A	F	%
Private	5,116	4,706	109
Coillte	20,657	21,950	94
Total	25,773	26,656	97

¹ A: Actual harvest; F: Forecast harvest; D: Difference % = actual harvest expressed as a % of NRV forecast

5.2.5 Roundwood prices - Coillte

Coillte is currently 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 25 below are for sales to the sawmill sector only and include all species and harvest types. As the mix of species and harvest types can vary from quarter to quarter, this can impact 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.

Table 25. Coillte Average Standing Timber Prices (€/m³) by tree size category²⁶.

Category (m ³)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
0.001 - 0.074	-	-	10.5	-	-	-	-	39.4	-	-	-
0.075 - 0.124	-	-	-	-	-	41.2	-	-	-	-	-
0.125 - 0.174	-	8.5	9.5	-	-	-	-	40.1	-	-	-
0.175 - 0.224	38.6	32.8	-	-	-	-	-	56.6	-	44	-
0.225 - 0.274	47.6	39.5	40.9	43.7	49.2	50.0	43.5	44.2	66.4	51.8	58.4
0.275 - 0.324	43.8	42.3	43.2	47.1	52.4	49.9	45.8	46.0	62.4	55.6	64.7
0.325 - 0.374	44.1	43.7	44.5	51.3	54.5	53.9	44.7	51.8	70.5	54.3	63.3
0.375 - 0.424	58.2	44.4	46.8	48.6	57.3	56.5	48.1	51.1	67.8	53.7	60.9
0.425 - 0.474	55.5	47.2	45.6	52.0	58.6	58.4	50.5	50.6	75.0	57.3	69.9
0.475 - 0.499	55.1	46.0	48.5	54.5	62.1	62.9	54.4	52.1	73.9	63.9	61.6
0.500-0.599	59.9	48.3	50.5	51.6	62.2	63.3	54.5	55.2	70.0	61.5	64.5
0.600-0.699	63.7	49.0	52.9	55.4	67.2	66.0	57.2	57.1	76.8	57.3	68.6
0.700-0.799	58.8	49.9	54.1	55.6	65.7	59.6	57.0	57.6	81.9	65.3	60
0.800-0.899	57.1	50.7	52.8	57.4	71.8	67.9	58.7	56.8	76.5	61.8	65.7
0.900-0.999	56.0	51.3	54.0	60.7	66.4	67.0	58.4	57.4	80.7	67.6	66.7
> 1.000	59.6	51.3	53.8	54.0	74.3	71.1	60.8	60.3	76.7	65.6	69.8
Average (€/m³)	53.7	43.2	45.9	52.7	61.8	60.5	52.8	52.6	73.2	58.4	64.5

5.2.6 Roundwood Prices - Private Sector

The UCD Forestry Section and the Irish Timber Growers Association (ITGA) collate timber price information from private sources, publishing it in the *Forestry and Timber Yearbook* annually. The prices are averages derived from small sales data received from a range of growers and therefore prices presented in Table 26 below are for guidance purposes only. The prices presented in Table 26 include pulpwood prices from the private sector.

Table 26. Annual private standing roundwood prices (€/m³) 2010-2020²⁷.

Category (m ³)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
0.001 - 0.074	10.5	10.6	10.2	9.44	14.04	13.17	7.7	9.39	12.5	14.7	14.8
0.075 - 0.124	14.4	14.3	14.3	12.8	13.53	16.33	11.4	12.15	15.05	16.82	21.98
0.125 - 0.174	17.4	13.5	19.2	18.96	18.4	19.55	14.9	12.26	18.88	24.96	31.38
0.175 - 0.224	22.9	15.8	17.8	20.44	28.72	20.79	17.9	20.67	24.37	26.6	29.94
0.225 - 0.274	35.3	23.1	25.1	18.62	33.14	30.75	17.1	19.64	34.75	42.28	42.52
0.275 - 0.324	47.1	36.9	32.9	21.84	34.06	33.59	28	27.51	38.71	33.18	-
0.325 - 0.374	64.1	57.5	38.6	47.42	39.64	34.32	26.7	43.36	36.15	-	-
0.375 - 0.424	56.7	52.3	28.4	44.48	49.03	43.32	39.3	41.87	49.07	27.1	47.57
0.425 - 0.474	54.2	53.3	48.3	32	65.93	39.21	49.4	-	58.61	62	47.01
0.475 - 0.499	53	35	-	-	-	-	-	48	53.1	54.07	48
0.500 - 0.599	57.1	50.3	49.2	45.05	61.85	47.56	44	51.31	58.52	57.17	48.29
0.600 - 0.699	54.3	51.7	51.8	45.99	56.82	58.99	58.8	49.4	58.3	61.28	48
0.700 - 0.799	54.3	52.6	54.7	53.79	64.21	59.53	49.4	52.74	52.34	47.98	48
0.800 - 0.899	53.7	50.4	54.9	53.35	67.72	59.54	49.8	50.71	59.57	62	51.55
0.900 - 0.999	52.9	53.4	54.8	51.26	65.16	64.74	57.5	53.75	57.97	58.74	48.98
1.000 and over	56.9	45	54.2	52.97	60.38	61.5	60.9	54.04	58.61	60.62	48.67

An additional source of information on the range of prices paid for privately owned timber during 2018 is the IFA Timber Price Survey (Table 27). The prices paid for timber varied

²⁶ *Forestry & Timber Yearbook 2019*. Irish Timber Growers Association, Dublin.

²⁷ *Forestry & Timber Yearbook 2019*. Irish Timber Growers Association, Dublin.

significantly, for example the pulp prices quoted ranged from €20 to €34/tonne, depending on distance to market, access to the site and the size of the sale. The prices for sawlog varied from €68 to €90/tonne throughout the year, which represents an increase compared to the 2017 survey.

Table 27. IFA Timber Price Survey April – June 2020 (Price € /tonne roadside excl. vat)²⁸.

Product Type	Length (m)	Diameter (cm)	Price (€)
Pulp	3 m	< 7cm	28-32
Stakewood	1.6 m	> 8cm < 15 cm	40-44
Palletwood	2.5 m	> 14 cm	46-50
	3.1 m		52-57
	3.4 m		
	3.7 m		56-60
Sawlog	4.9m	> 20cm	75-80
	5.5 m		

5.2.7 Forest-based biomass

Forests also provide a source of renewable raw materials and replace materials and energy produced from fossil fuels 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 2018, 40% of wood fibre available for use in the Republic of Ireland was used for energy generation, mainly within the forest products sector (Table 28). The usage of forest based biomass for the energy sector abated 0.88 million tonnes of CO₂ emissions in 2018.

Table 28. Use of forest-based biomass and as a proportion of total roundwood harvest (2010-2018) (000 m³ overbark)²⁹.

	2010	2011	2012	2013	2014	2015	2016	2017	2018
Wood-biomass use by the energy ³⁰ and forest products industry	554	572	611	660	760	796	1,049	1,296	1,080
Roundwood chipped for primary energy use	39	41	30	100	100	114	117	49	67
Domestic firewood use	199	214	225	230	235	237	237	239	243
Short rotation coppice	1	5	5	5	5	5	20	20	18
Wood pellets and briquettes	121	129	144	161	150	154	160	175	172
Charcoal	2	5	2	1	1	1	1	1	2
Total	916	966	1,017	1,157	1,251	1,307	1,584	1,780	1,582
Roundwood harvest									
Roundwood available for processing	2,708	2,740	2,594	2,852	2,975	3,016	3,108	3,242	3,248
Firewood harvest	199	214	225	230	235	237	237	235	243
Total	2,907	2,954	2,819	3,082	3,210	3,253	3,345	3,477	3,491
Forest-based biomass as a % of total roundwood harvest	31.5	32.6	36.0	33.5	36.3	34.8	34.1	42.1	40.0

²⁸ Available from: <https://www.ifa.ie/market-reports/timber-price-surveys/>

²⁹ *Woodflow and forest-based biomass energy use on the island of Ireland*, 2018. COFORD, Department of Agriculture, Food and the Marine.

³⁰ This includes co-firing of wood-biomass at Edenderry Power Station, Co. Offaly.

5.3 Firewood production

Statistics on the sale of firewood from public forests between 1937 and 1987 are shown in Figure 28. Firewood consumption peaked during the Second World War due to restricted coal imports. There was also increasing firewood demand during the 1980's, reflected in increased sales during this period. Official estimates of firewood use are unavailable between the years 1988 and 2005.

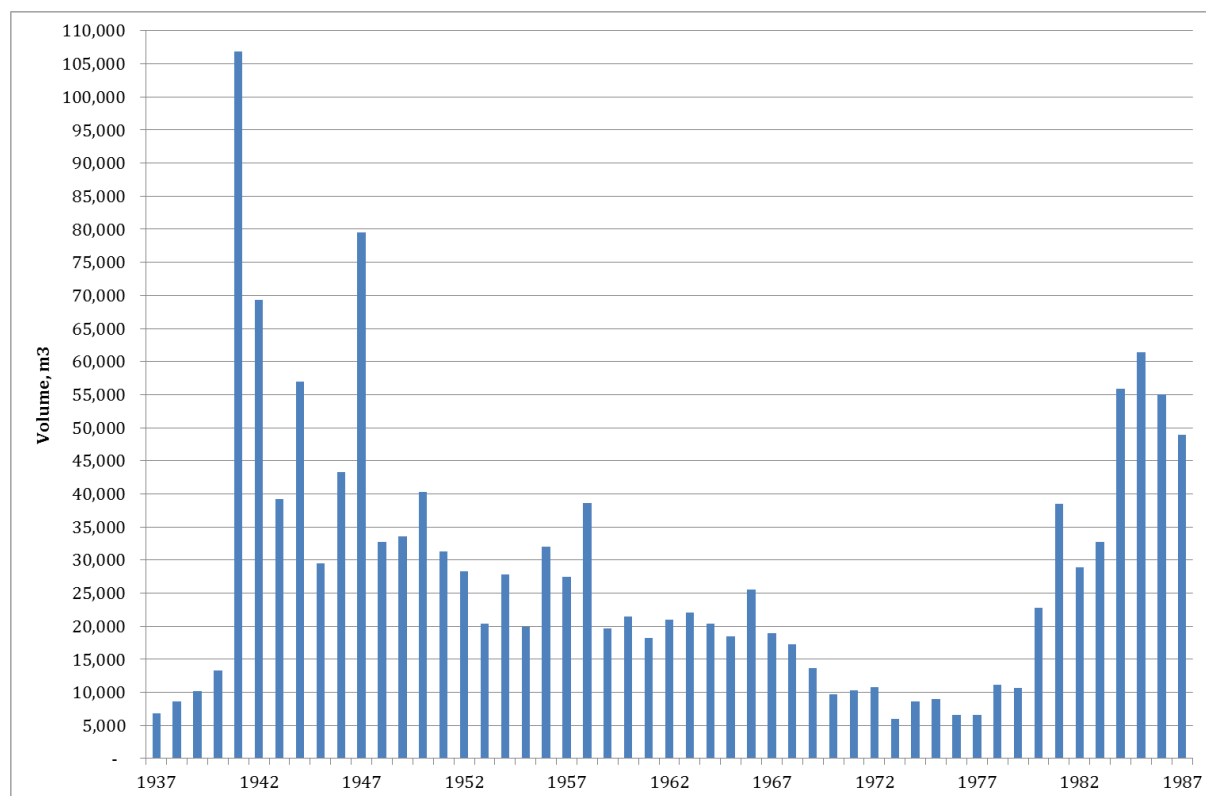


Figure 28. Firewood production volume from public forests 1937-1987.

Residential energy use grew by 18.3% (0.4% per annum) over the period 1990–2015. Corrected for weather, the growth was 10%. During this time the number of households in the State increased by 74%, from approximately 1.0 million to 1.75 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 1990³¹.

Despite this, due to the significant increase in the number of households and energy usage per household there has been a concurrent increase in firewood sales since the 1980's. Between 2006 and 2018 the firewood market in Ireland has grown by 63%, from 147,000 m³ in 2006 to 243,000 m³ in 2018, and the market is now estimated to be worth €35 million³². Figure 29 shows firewood use in Ireland between 2006 and 2018 from State and private forests, including wood sourced from non-forest areas. The introduction of grant aid in 2009 for first thinning of broadleaf forests 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 this is not accounted for in current figures.

³¹ *Energy in Ireland 1990–2015, 2016 Report*, 2016. Sustainable Energy Authority of Ireland.

³² *Woodflow and forest-based biomass energy use on the island of Ireland*, 2018. COFORD, Department of Agriculture, Food and the Marine.

Initiatives such as *The Wood Fuel Quality Assurance (WFQA)* scheme for Ireland administered by the Irish Bioenergy Association (Irbea) increases consumer confidence in wood fuel products sold in Ireland. The WFQA independently certifies and verifies suppliers of firewood, wood pellets, woodchip and wood briquettes. All certification is carried out against EN ISO 17225 standards for biomass fuels. By 1st January 2022, all wood burning stoves must comply with the Ecodesign European directive in a bid to tackle air pollution and particulate emissions. By 1st January 2020 the directive applies to all biomass boilers. Firewood at 20% moisture content produces less than 33% of the emissions of wood fuel at 30% moisture content when burned in older stoves. However if firewood is burned in modern Eco-Design stoves the emission levels are reduced by almost 90%. Firewood will continue to provide an important market for forest owners in the thinning of forests.

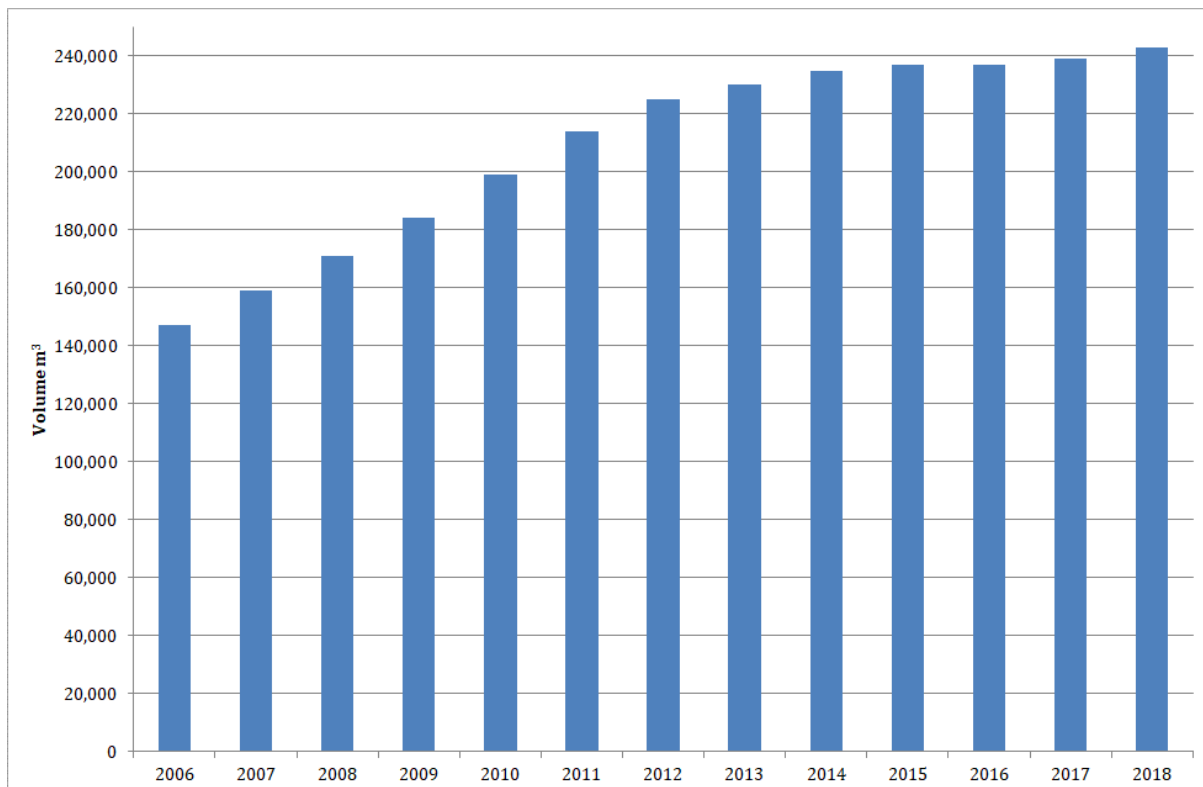


Figure 29. The domestic firewood market 2006-2018.

5.4 Timber and paper products trade

In 2018, exports of forest products from the Republic of Ireland were valued at €450 million, an 8.7% increase on 2017. Wood-based panels accounted for nearly 54% of the value of forest products exports, the balance comprising paper and sawn timber exports (Table 29). 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 exported €146 million of sawn timber in 2018, mainly to the UK.

Table 29. Timber and paper products trade, volume and value (2010-2018)³³

	Imports																	
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2010	2011	2012	2013	2014	2015	2016	2017	2018
	000 m ³									€ million								
Sawn timber	242	201	145	134	205	227	250	266	339	74	64	54	51	74	88	92	99	126
Wood-based panels	166	195	204	194	235	240	242	273	275	65	68	75	78	98	112	112	129	126
	000 tonnes									€ million								
Pulp products	41	54	47	50	46	51	46	45	41	31	45	45	41	42	53	45	45	37
Paper & particle-board products	370	383	415	428	404	427	417	407	388	313	333	339	340	340	359	337	335	353
	TOTAL									483	510	513	510	554	612	586	608	642
	Exports																	
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2010	2011	2012	2013	2014	2015	2016	2017	2018
	000 m ³									€ million								
Sawn timber	658	619	534	601	718	701	806	875	832	85	83	73	81	122	121	122	129	146
Wood-based panels	660	616	630	665	610	610	628	660	691	179	173	179	199	198	190	206	224	243
	000 tonnes									€ million								
Pulp products	1						3		18							1	1	1
Paper and particle-board products	33	59	68	81	67	86	137	40	37	44	52	51	59	50	44	51	69	60
	TOTAL									308	308	303	339	370	355	380	423	450

³³ Roundwood, sawmill residues and secondary processed timber products are not included. Data sourced from COFORD Connects *Woodflow* Series, available from: <http://www.coford.ie/publications/cofordconnects/>

5.5 Carbon stocks

Forests and forest products play an important role in mitigating climate change by sequestering and storing atmospheric carbon dioxide (CO₂). Sequestration is the net removal of CO₂ from the atmosphere, and storage in plant biomass, deadwood and harvested wood product pools. CO₂ is taken up during photosynthesis and stored as biomass. Some carbon is released back into the atmosphere due to autotrophic respiration and from the forest deadwood, litter and soils pool due to decomposition. Sustainably managed forests are a net absorber of carbon. However, unmanaged and degrading forests eventually become a net emitter of carbon back into the atmosphere. Large emissions can also occur during catastrophic disturbance events, such as fires and windthrow. About half of carbon in harvested timber is stored in wood products (HWPs) but these carbon stores are eventually released back into the atmosphere. Use of wood for bioenergy replaces fossil fuel use and has the potential to reduce overall emissions. Fossil fuel emissions can also be reduced by substituting energy intensive materials with wood products (i.e. product substitution).

5.5.1 National Carbon Stocks

The national forest estate is an important carbon reservoir, amounting to 311.7 million tonnes of carbon in 2017 as estimated using data from the 3rd cycle NFI (Table 30). Carbon in biomass and litter pools have increased from 2012 to 2017. Since 2012, changes have arisen in the NFI methodology and biomass estimation techniques. More accurate biomass equations, new classification systems and associated C stock values were introduced for soil and deadwood, therefore the 2017 data are not comparable with the C stock estimates from 2006 and 2012.

The carbon stock in forest soils is the dominant component, accounting for 79.1% of the carbon in the forest estate in 2017. Total living tree biomass amounted to 17.9% of the total carbon stock, while deadwood, including logs, stumps and standing dead trees along with litter constituted the remaining 3%.

Table 30. Forest carbon stocks 2006, 2012 and 2017.

	2006		2012		2017	
Carbon stock	Million t	% Total	Million t	% Total	Million t	% Total
Above-ground biomass*	30.6	8.9	39.7	10.4	45.6	14.6
Below-ground biomass**	6.7	1.9	8.8	2.3	10.3	3.3
Deadwood***	1.2	0.4	2.5	0.6	2.1	0.7
Litter	2.3	0.7	6.3	1.6	7.1	2.3
Soil	304.9	88.1	323.7	85.1	246.6	79.1
Total	348.4	100.0	381.0	100.0	311.7	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.

5.5.2 Current net greenhouse emissions and removals from forests

Greenhouse gas emissions and removals are estimated using the CBM-CFS model based on data from the NFI, FAO-EUROSTAT data on harvested wood products (HWPs) and other data sources. The data presented in table 31 is taken from the National GHG inventory, which is submitted to the UNFCCC annually. Reporting also uses emission factors and activity data derived from national and international research, in accordance with IPCC good practice and UNFCCC rules, such as: carbon dioxide (CO₂) and non-CO₂ emissions from fires, drained organic soils and harvested wood products²⁰.

Table 31. Changes in C fluxes for biomass, litter and deadwood and soil C pools and net CO₂ emissions from 1990-2019.

Year	Carbon Stock Changes (Gg C) (removal is a positive value & an emission a negative value)							Overall Balance (Gg CO ₂ eq.) (removal is a negative value & an emission a positive value)		
	Living biomass	Litter & Deadwood	Mineral soils	Organic soils	Fire	HWP	Total	CO ₂	non-CO ₂	Total
1990	1194.8	52.2	-9.7	-158.6	-101.4	112.6	1089.9	-3996.4	151.4	-3845.0
1995	968.9	55.3	-13.3	-199.0	-132.4	185.4	865.0	-3171.5	189.0	-2982.5
2000	767.7	3.8	-11.3	-224.0	-87.1	306.3	755.5	-2770.2	206.1	-2564.0
2005	1026.4	23.7	-4.7	-245.0	-52.1	308.1	1056.3	-3873.1	223.8	-3649.3
2006	922.3	-119.8	-7.3	-245.7	-52.1	337.4	834.8	-3060.8	227.5	-2833.3
2007	902.8	80.9	-4.6	-246.4	-58.6	326.8	1000.9	-3670.0	231.4	-3438.6
2008	1452.0	-73.4	-5.2	-245.9	-60.5	174.1	1241.0	-4550.5	234.4	-4316.1
2009	1186.3	142.2	-0.8	-247.8	-34.1	193.9	1239.7	-4545.6	234.3	-4311.3
2010	1211.5	160.2	0.5	-248.5	-223.0	223.3	1123.9	-4121.0	259.7	-3861.3
2011	1203.8	158.7	1.5	-249.4	-82.8	202.3	1234.1	-4525.1	245.5	-4279.6
2012	1324.0	162.6	2.3	-250.0	-20.9	182.3	1400.3	-5134.4	240.5	-4893.9
2013	1556.9	3.8	1.5	-249.1	-89.1	180.6	1404.7	-5150.4	248.4	-4902.0
2014	1087.0	352.0	6.3	-249.2	-71.2	208.1	1333.0	-4887.6	247.4	-4640.2
2015	1199.3	148.5	4.5	-248.1	-39.8	198.7	1263.2	-4631.9	247.1	-4384.8
2016	1238.7	197.9	3.8	-250.2	-8.1	219.2	1401.4	-5138.5	245.3	-4893.2
2017	1165.1	252.8	5.3	-253.6	-421.2	237.0	985.3	-3612.6	297.1	-3315.5
2018	1058.4	366.5	5.6	-256.0	-107.3	225.2	1292.4	-4738.7	262.9	-4475.8
2019	1288.3	240.5	4.6	-257.9	-12.3	168.5	1431.7	-5249.7	254.0	-4995.7

Removals by Ireland's forests (i.e. net sequestration) increased from 3.8 Mt carbon dioxide equivalents (CO₂ eq.) in 1990 to 4.9 Mt CO₂ eq. by 2019. (Table 31). These estimates include HWP removals and emissions from fires and deforestation. The trends in forest GHG removals are related to the level of annual harvest, extent of afforestation or deforestation and changes in the age class structure of the national forests over time²¹. Negative CO₂ values represent a net removal of CO₂, but negative C values represent a net emission of C.

²⁰ Duffy, B. Hyde, E. Hanley, P. O'Brien and K. Black 2021. National inventory report Greenhouse gas emissions 1990 – 2019 Reported to the united nations Framework convention On climate change, EPA, Dublin.

²¹ Black, K., Hendrick, E., Gallagher, G., Farrington, P. 2012. Establishment of Irelands projected reference level for Forest Management for the period 2013-2020 under Article 3.4 of the Kyoto Protocol. *Irish Forestry* 69: 7-32.

6. The-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 and harvesting subsectors (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 and 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 was €2.3 billion, when both indirect and induced effects were taken into account;
- The total GVA of the forest sector was €1,096.5 million in 2012;
- The total value of economic activity in the growing and harvesting sector in 2012 was €387 million;
- For every €1 of economic activity generated in the growing and harvesting subsector a further €0.78 was generated in the wider economy in 2012;
- The total value of economic activity in the wood processing sector in 2012 was €1389.1 million;
- For every €1 of economic activity in wood processing an extra €0.66 was generated in the wider economy in 2012;
- The number of people employed directly in the forestry and logging sector averaged 2,800 between 1998 and 2017;
- In 2012 total employment generated by activities in the forest and wood products sector was 12,000 full time equivalents;
- Between 2003 and 2012 the overall value of both the growing and harvesting subsector and wood processing subsector grew by 46% and 39% respectively;
- The number of people employed directly in the wood processing subsector has decreased since the economic downturn in 2008;
- Visits to Irish forests are estimated to be over 29 million visits per annum;
- In 2020, total expenditure was €79.2 million which includes afforestation grants, annual premium payments and grant aid for forest roads.

6.2 Value of the forest Sector

The total value of economic activity in the forest sector, both directly of itself and to the wider Irish economy, is shown in Table 32. The total direct value of economic activity in the growing and harvesting subsector in 2012 was €387 million. Value to overall Gross Domestic Product or Gross Value Added (GVA) was €136.6 million. In terms of the multiplier effect of this economic activity, for every €1 generated in the growing and harvesting subsector a further €0.78 was generated in the wider economy in 2012. This resulted in the growing and harvesting subsector contributing an overall value of €688.7 million to the wider Irish economy, an increase of €216 million since 2003.

The total value of economic activity in the wood processing subsector in 2012 was €1389.1 million, adding €391.6 million 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 €910.3 million (€2,299.4 – €1,389.1 million), an increase of €235 million since 2003.

The total GVA of the forest sector was €1,096.5 million in 2012, and an approximation of the full economic value of the forest sector in 2012 was €2.3 billion, when both indirect and induced effects were taken into account.³⁴

Table 32. Value of economic activity in the forest sector.

	2003 ³⁵	2012 ³⁶
Growing and harvesting subsector	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 subsector		
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

³⁴ *Annual Review and Outlook for Agriculture, Food and the Marine 2013/14*, 2014. Department of Agriculture, Food and the Marine.

³⁵ *The Socioeconomic Contribution of Forestry in Ireland – an Interdisciplinary Approach*, 2006. COFORD, Department of Agriculture, Food and the Marine, Dublin.

³⁶ 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 to be 6,408³⁷.

In 2012 COFORD estimated that the total employment generated by activities in the forest and wood products sector was 12,000 full time equivalents³⁸.

6.3.1 Categorisation of employment statistics

There is an EU wide nomenclature for the classification of economic activity, which is referred to as NACE³⁹. The class *Forestry and Logging* is most relevant for the purpose of this publication and includes the following four components:

- 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 the transport of logs to sawmills 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 Labour Force Survey

The Labour Force Survey (formerly the Quarterly National Household Survey) 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 28 below, average annual estimates are displayed.

The number of people employed directly in the forestry and logging sector has averaged 2,800 between 1998 and 2017 while the average number employed directly in sawmilling and planing of wood has averaged 7,200 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

³⁷ *An Economic Evaluation of the Market and Non-Market Functions of Forestry*, 2013. COFORD, Department of Agriculture, Food and the Marine.

³⁸ *Irish Forestry and the Economy*, 2014. COFORD. Department of Agriculture, Food and the Marine.

³⁹ Description of NACE codes available at <http://www.cso.ie/px/u/NACECoder/NACEItems/searchnace.asp>

2008 (Figure 30). Estimates were not produced for 2015, 2018, 2019 and 2020 as the sample size was too small to be considered reliable. Estimates for 2014, 2016 and 2017 are considered to have a wide margin of error and should be treated with caution.

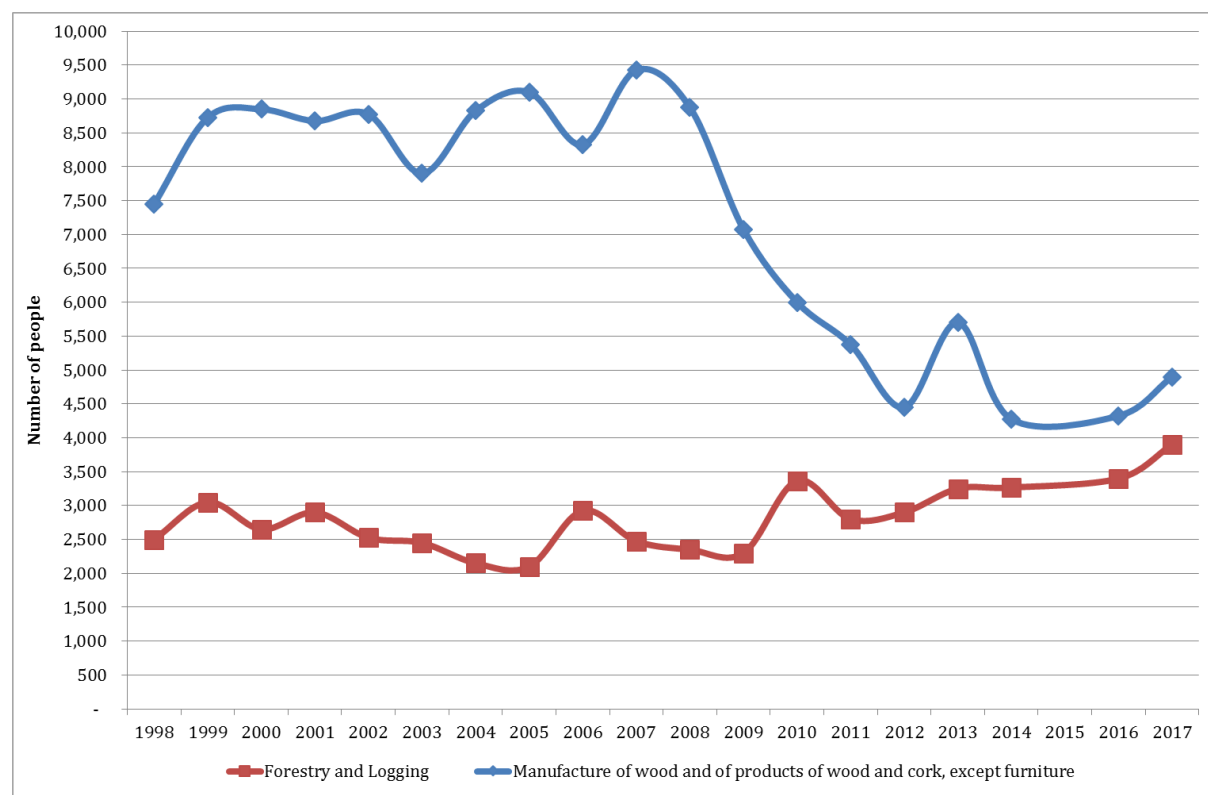


Figure 30. Labour Force Survey estimates (1998-2017).

6.3.3 Census of Ireland 2006, 2011 and 2016

Table 33 outlines persons aged 15 and over, classified by principal economic status and detailed industrial group involved in forestry, logging and related activities⁴⁰. The unemployment rate in the sector has fallen to 5.5% in 2016 in both Forestry and Logging and Manufacture of wood and wood products. The total in the labour force for wood and wood products has also decreased significantly from 5,530 in 2011 to 4,000 in 2016 (Table 33).

The statistical classification of economic activities in the European Community, abbreviated as NACE, is used to categorise the census data. The NACE Rev.1 classification was used in 2006, whereas the NACE Rev.2 classification data is used for the 2011 and 2016 census.

Table 33. Persons 15 years and over involved in forestry by principal economic status.

NACE 02 - 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	2,169	1,676	237	1,913	256	9.5
2016	2,468	1,978	290	2,268	200	5.5
NACE 16 - 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	5,530	3,767	647	4,414	1116	20.6
2016	4,000	3,182	429	3,611	389	5.5

⁴⁰ Available from :

<https://www.cso.ie/en/csolatestnews/presspages/2017/census2016profile11employmentoccupationsandindustry>

6.4 Forests & Recreation

There has been a long-standing policy in place of encouraging the use of forests for outdoor recreation. Table 34 shows an upward trend in visitor number to Irish publicly owned forests between 1999 and 2015.

Table 34. Estimate of number of visits to Irish forests 1999 - 2015.

Year	Number of forest visits
1999 ⁴¹	8,500,000
2004 ⁴²	11,000,000
2005 ⁴³	18,000,000
2015 ⁴⁵	29,105,759

Since the early 1970's there has been an active programme of providing recreational facilities in State forests. At the present time there are nearly 300 recreational sites, 12 forest parks and over 3000 km of hiking trails in forests throughout the country⁴⁴. 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 440,000 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. The most recent figures estimate 29,105,759 visits to Irish forests per annum, and values forest recreation at €179 million per annum⁴⁵.

For the private forest estate the decision to allow public access rests with the forest owner, and is provided on a goodwill basis⁴⁶. Private forest owners who have availed of a roading grant in recent years allow public access to the forest road which may be subject to certain conditions. Public access does not establish any legal right of access by the public to a grant aided forest road.

⁴¹ Clinch, P. (1999), *The Economics of Irish Forestry*, COFORD, Department of Agriculture, Food and the Marine.

⁴² Bacon, P. and Associates (2004). *A Review and Appraisal of Ireland's Forestry Development Strategy*, Final Report. Stationery Office, Dublin

⁴³ 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

⁴⁴ <http://www.coillte.ie>

⁴⁵ ECOVALUE: *Valuing the Ecosystem Services of Irish Forests*, 2015. Teagasc.

⁴⁶ *Forest Recreation in Ireland A Guide For Owners & Managers*, 2006. Forest Service, Department of Agriculture, Food and the Marine.

6.5 State Expenditure on Forestry

Since 1993, nearly €3 billion has been expended by the State and European Union on afforestation, including existing premium liabilities and other support measures for the forest sector. In 2020, €79.2 million was spent on forest activities including afforestation, maintenance grants, annual premium payments and grants for forest road infrastructure (Figure 31). Expenditure in 2020 decreased by €10.7 million on the previous year due in part to reduced afforestation levels and the payment of forest premium. A detailed breakdown of expenditure by activity since 2008 is provided in Table 35.

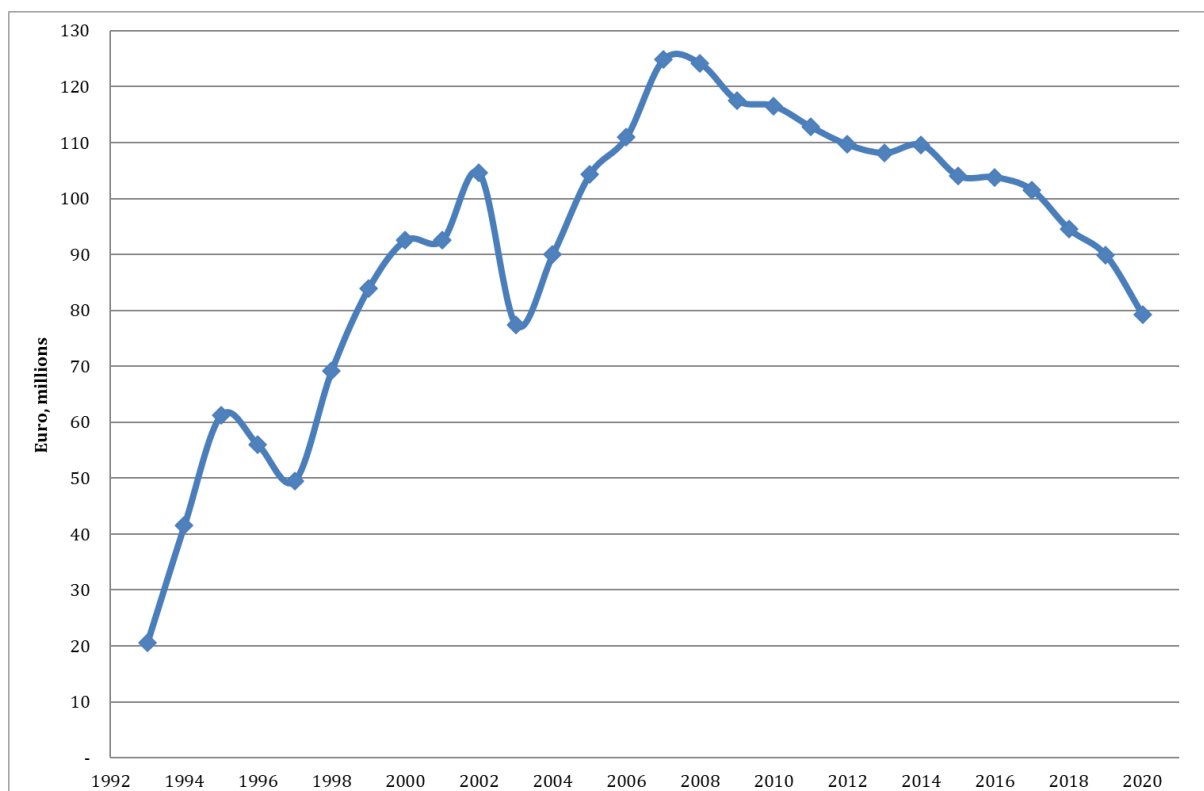


Figure 31. Total state expenditure on forestry (1993-2020).

Table 35. Annual state expenditure on forestry (2008-2020).

Expenditure (1000's Euro)	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Main Afforestation Programme													
Grant – 1 st Instalment	19,852	22,080	27,557	20,482	19,215	17,033	16,759	17,480	18,420	15,819	12,270	10,769	8,074
Grant – 2 nd Instalment	9,470	8,675	7,441	7,697	6,334	7,291	7,630	7,357	6,881	6,192	5,916	5,243	5,396
Premium	74,264	70,496	72,285	75,005	75,685	76,013	77,501	73,609	72,418	71,511	68,089	64,063	57,540
Sundry (e.g. Debt Recovery)	1,192	1,075	505	647	379	523	620	259	79	108	106	77	88
Afforestation Total	104,778	102,326	107,789	103,831	101,614	100,860	102,511	98,705	97,798	93,630	86,381	80,151	71,098
Forest Roads-Harvesting	7,129	5,400	3,694	4,204	3,077	2,709	2,794	2,381	2,561	3,889	3,038	3,796	4,013
Reconstitution of Woodlands	2,108	790	966	827	567	257	253	222	248	130	109	19	27
Chalara (RCW)	0	0	0	0	0	693	1,274	688	446	811	1,822	1,311	434
Storm Darwin (RCW)	0	0	0	0	0	0	0	0	0	0	437	195	64
Woodland Improvement Scheme	233	374	248	164	70	65	76	28	22	29	17	6	0
Thinning & Tending – WIS	0.0	0.0	610	750	971	864	666	470	593	603	441	636	671
CCF - WIS	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	74.6
Shaping of Broadleaves	57	83	10	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pruning of Conifers	189	454	56	0.0	233	94	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NeighbourWood	578	670	180	351	435	146	6	0.0	167	130	116	0	199
Native Woodland Conservation	1,724	851	819	829	1,221	845	514	211	194	289	365	648	504
NDP Other Measures	170	52	3	11	-2	0	0	0	0	0	0	0	0
Environmental Assessments	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	407
Other	0	0	0	0	0	0	0	0	0	31	21	3	1
Support Schemes Total	12,187	8,674	6,587	7,136	6,573	5,673	5,582	3,999	4,356	5,912	6,366	6,614	6,396
Reforestation	8	4	13	11	0	5	0.0	0.0	11	0.4	0	1	0
Forest Inventory	69	15	7	69	41	30	18	68	34	42	45	11	81
Other Capital Total	76	19	20	81	41	35	18	68	45	43	45	11	81
Total Capital	117,041	111,018	114,395	111,048	108,227	106,568	108,111	102,772	102,199	99,585	92,793	86,777	77,575
Promotion	1,738	487	289	864	799	828	684	693	840	1,060	1,123	2,189	1,007
Training	820	1,122	954	226	105	80	103	0	0	0	0	0	0
Knowledge Transfer	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	37
Technical Support	379	752	393	92	85	232	268	278	234	180	112	111	124
Fees International Organisations	31	37	39	189	8	16	8	10	10	10	0	0	0
Forest Sector Development (Coford)	4,258	4,289	401	408	380	425	304	350	424	606	475	670	474
Miscellaneous (e.g. legal, printing)	-123	-195	94	4	41	20	144	-65	119	100	52	142	3
Total Current	7,103	6,491	2,171	1,782	1,418	1,601	1,511	1,265	1,627	1,956	1,762	3,112	1,646
Overall Total	124,145	117,510	116,566	112,830	109,646	108,169	109,622	104,037	103,826	101,541	94,555	89,889	79,221

7. Forest Protection and Health

7.1 Introduction

One of the key objectives of the Forestry Inspectorate of DAFM is to implement the forestry aspects of the EU Plant Health Regulation 2016/2031 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 Forestry Inspectorate has responsibility for the implementation of 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 Forestry Inspectorate also oversees the national implementation of the FAO, IPPC International Standard for Phytosanitary Measures (ISPM) 15, Regulation of 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

- In 2020 Brexit preparedness work continued to be a priority for the Forest Health Section particularly in relation to contingency planning for a post-transition period with no trade deal agreed.
- 2020 was designated as the FAO International Year of Plant Health. COVID-19 impacted the work of the Forest Health Section and limited capacity to carry out live events.
- There were no findings of any EU priority pests or pests for which Ireland has current EU Protected Zone status in Irish forests during annual surveys in 2020;
- Ash dieback disease caused by the fungus *Hymenoscyphus fraxineus* (previously referred to as *Chalara fraxinea*) was first found in Ireland in October 2012. Surveys conducted in 2020 included a systematic survey of National Forest Inventory points across the country leading to further findings. By the end of 2020 there had been findings in ash in over 660 locations in various settings – forests, nurseries and garden centres, on farm planting, roadside planting, hedgerows and private gardens in all 26 counties.
- *Phytophthora ramorum* was first detected in Japanese larch in 2010 and at the end of 2020 has been confirmed present at a total of 56 locations in this tree species;
- In 2020 the brown spruce longhorn beetle *Tetropium fuscum* was found for the first time in Ireland in Norway spruce in a forest plantation in Co. Roscommon.
- In 2020 a new Protected Zone was achieved for the pine processionary moth *Thaumetopoea pityocampa*
- 51 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 Forestry Inspectorate is responsible for implementing the forestry aspects of the EU Plant Health Regulation 2016/2031 on protective measures against pests of plants. Under the EU Plant Health regime, 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, Environment and Rural Affairs (DAERA) involving regular meetings of the North South Ministerial Council and the Plant Health Sub-Group.

The Forestry Inspectorate 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 forest pests and diseases.

Regulation (EU) 2016/2031 became effective from 14th December 2019 repealing and replacing the existing Council Directive 2000/29/EC. The related Official Controls Regulation 2017/625 also came into effect on that date and impacts inter alia on how official import controls and diagnostics are carried out. DAFM continues to actively organise policy and operational requirements to meet the articles of Regulation 2016/2031 and 2017/625. Increased stakeholder engagement is an important element of the new Plant Health regime and in 2020 the Forestry Inspectorate contributed to the roll out of the first DAFM Plant Health and Biosecurity Strategy and the International Year of Plant Health 2020 although many events were impacted by COVID-19.

7.2.1 Protected Zone Organisms

Ireland has Protected Zone status for 14 harmful organisms present in other EU Member States but not present here (Table 36). To justify Ireland's Protected Zone status, the Forestry Inspectorate conducts national forest surveys and submits reports annually to European Commission. No detections of the aforementioned organisms occurred in surveys conducted during 2018, 2019 and 2020. In 2020, on the basis of surveys carried out in 2018 and 2019 Ireland applied to the European Commission for, and was granted, a new Protected Zone for the pine processionary moth *Thaumetopoea pityocampa*.

The finding of *Ips typographus* in late 2018 in a woodland in Kent, England represents an increased threat of the introduction of this bark beetle to Ireland and prompted a coordinated response on the island of Ireland from DAFM and DAERA. As part of the additional risk-based surveys in 2019 and 2020 DAFM, in collaboration with Coillte, established a supplementary network of risk-based bark beetle monitoring plots distributed through the Coillte estate. These new targeted monitoring plots complement and enhance the existing systematically distributed network of plots.

Table 36. List of harmful organisms for which Ireland has Protected Zone status.

Protected Zone Organism
<i>Cephalcia lariciphila</i> (European web-spinning larch sawfly)
<i>Gilpinia hercyniae</i> (European spruce sawfly)
<i>Gremmeniella abietina</i> (Brunchorstia disease)
<i>Dendroctonus micans</i> (great spruce bark beetle)
<i>Ips amitinus</i> (small spruce bark beetle)
<i>Ips cembrae</i> (large larch bark beetle)
<i>Ips duplicatus</i> (northern bark beetle)
<i>Ips sexdentatus</i> (six-toothed bark beetle)
<i>Ips typographus</i> (eight-toothed spruce bark beetle)
<i>Hypoxyton mammatum</i> (hypoxyton canker)
<i>Cryphonectria parasitica</i> (chestnut blight)
<i>Thaumetopoea processioneae</i> (oak processionary moth)
<i>Thaumetopoea pityocampa</i> (pine processionary moth)

7.2.2 Other Regulated Organisms

The EU Plant Health Regulation sets out a list of priority pests which also require mandatory annual surveys and reporting including *Agrilus planipennis* (emerald ash borer), *Agrilus anxius* (bronze birch borer), *Anoplophora chinensis* (citrus long-horn beetle), *Anoplophora glabripennis* (Asian long-horn beetle) and *Bursaphelenchus xylophilus* (pine wood nematode). EU priority pests are those pests whose potential economic, environmental or social impact is the most severe for the Union territory. The Regulation also sets out a long list of Union quarantine pests which must be included in a multiannual survey plan of five to seven years. In 2020 a new survey network was established for the spruce weevil (*Pissodes strobi*), one of the Union quarantine pests, and which will be part of the new multiannual surveys. In 2020 Ireland also continued its participation in EU co-funded surveys for regulated pests. There were no findings of any EU priority or Union quarantine pests in Irish forests in 2020.

7.2.3 Surveys

In 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 is used. The Forestry Inspectorate also deals with queries and reports from the industry and general public in relation to forest and tree health issues including reports submitted via the web-based Tree Check App. This may involve site visits and taking of samples for laboratory analysis.

In 2020 in the course of routine forest health surveillance, ill-health was detected in Norway spruce (*Picea abies*) at a forest in Co. Roscommon. Follow-up sampling led to the first finding in Ireland of the brown spruce longhorn beetle (*Tetropium fuscum*). This beetle is widely present in Europe and is not regulated under the Plant Health Regulation. It is generally regarded as a secondary pest. Appropriate phytosanitary measures were taken at the site and wider surveys to detect the presence of the beetle are ongoing.

Dothistroma Needle Blight (DNB) was confirmed in Ireland for the first time in 2016. It was identified as being present on Scot's pine trees at two privately owned (grant aided) forests, one in southwest Limerick and one in northwest Cork. There have been 38 findings across 15 counties, affecting Scot's pine (*Pinus sylvestris*), lodgepole pine (*P. contorta*) and Corsican pine (*P. nigra*). There were no further findings of DNB in 2020. Figure 32 indicates the findings as of 31st December 2020 as illustrated on a 10 x 10km grid square basis.

In January 2018, another needle blight of pine, brown spot needle blight (BSNB) caused by the fungal pathogen *Lecanosticta acicola* was detected in Ireland for the first time in an arboretum in Co. Wexford on mountain pine (*P. mugo*) and Scots pine. Follow up surveys for this needle blight led to a second finding in a forest in Co. Wexford in 2018. There were no further findings of *L. acicola* in 2020. Under the new plant Health Regulation, both *Dothistroma* needle blight and brown spot needle blight are classed as regulated non-quarantine pests.

In the EU, the movement of plants for planting is regulated through the plant passport system. In Ireland therefore there are regular inspections of nurseries each year. The Department will only grant authorisation to issue a plant passport if a place of production and its immediate vicinity is free of the relevant harmful organisms.

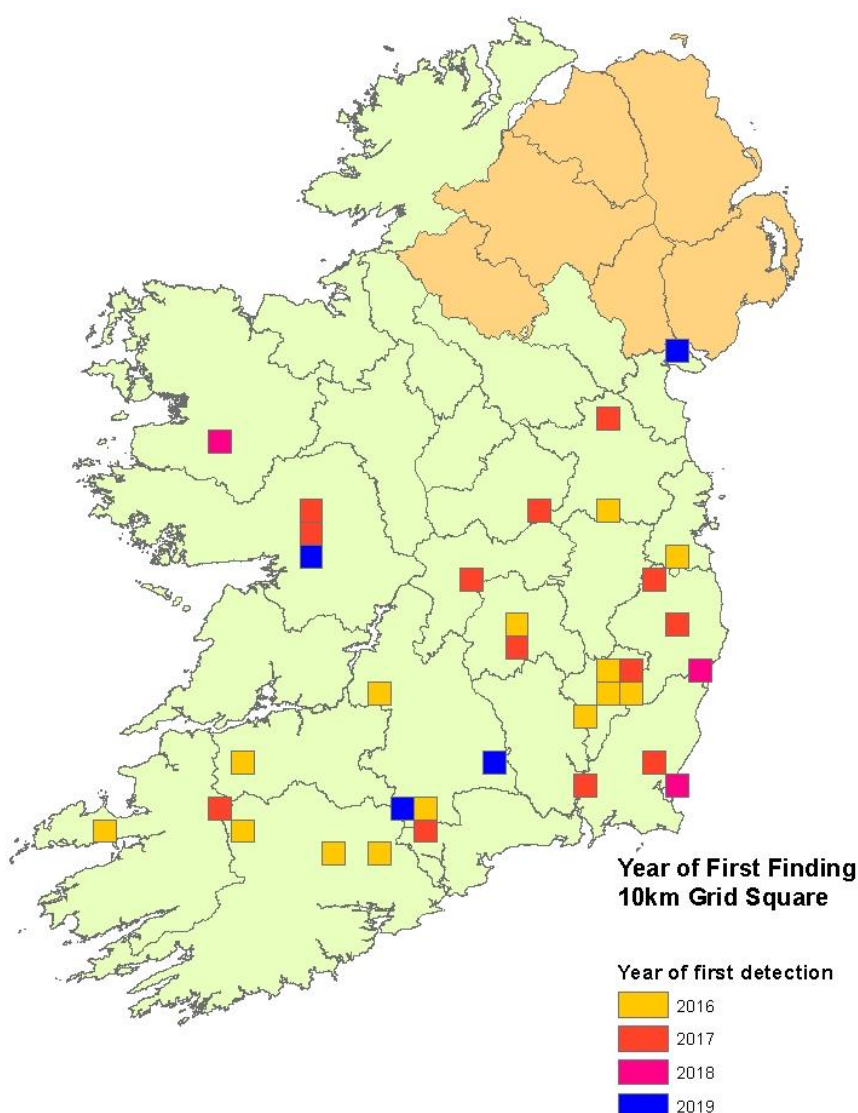


Figure 32. Findings of Dothistroma Needle Blight in Ireland 2016-2020.

7.2.4 Ash Dieback (*Hymenoscyphus fraxineus*)

Following the first confirmed finding of Ash Dieback disease in October 2012, on imported trees used in forestry plantations, 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 2020 included a systematic survey of National Forest Inventory points across the country in 10x10km grid squares where there had not previously been a confirmed positive. The surveys complemented our survey for the Union priority pest emerald ash borer. By the end of 2020 there had been findings in ash in all 26 counties in over 660 locations in various settings – forests, nurseries and garden centres, on farm planting, roadside planting, hedgerows and private gardens. In 2020, due to the wide distribution of Chalara Ash Dieback Disease reports of the disease from the general public in non-grant aided ash trees, for example garden trees and hedgerow trees, were not routinely sampled for laboratory analysis. In light of the increasing numbers of findings DAFM switched to mapping findings on the basis of whether the disease has been found in 10km grid squares rather than showing and recording individual findings. Figure 33 displays the findings as of 31st December 2020 as illustrated on a 10x10km grid square basis.

While *H. fraxineus* is not a regulated disease under the EU Plant Health Regulation (2016/2031) a Ministerial Order to provide for measures to prevent the spread of *H. 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. The legislation in relation to ash wood imports was updated in 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. In April 2018, DAFM commenced a review of the national response to ash dieback including the Reconstitution Scheme on the basis that eradication of the disease is no longer a possibility. This included a stakeholder and public consultation period, detailed field consideration of damage level evaluation together with a broader range of silvicultural and management options with the assistance of Teagasc and international experts. Support schemes were reviewed to ensure the continued relevance of DAFM's response and value for money, and to ensure that the forest owner is provided with a broader range of silvicultural and management options. In July 2020, the new Reconstitution and Underplanting (RUS) Scheme for ash dieback was launched.

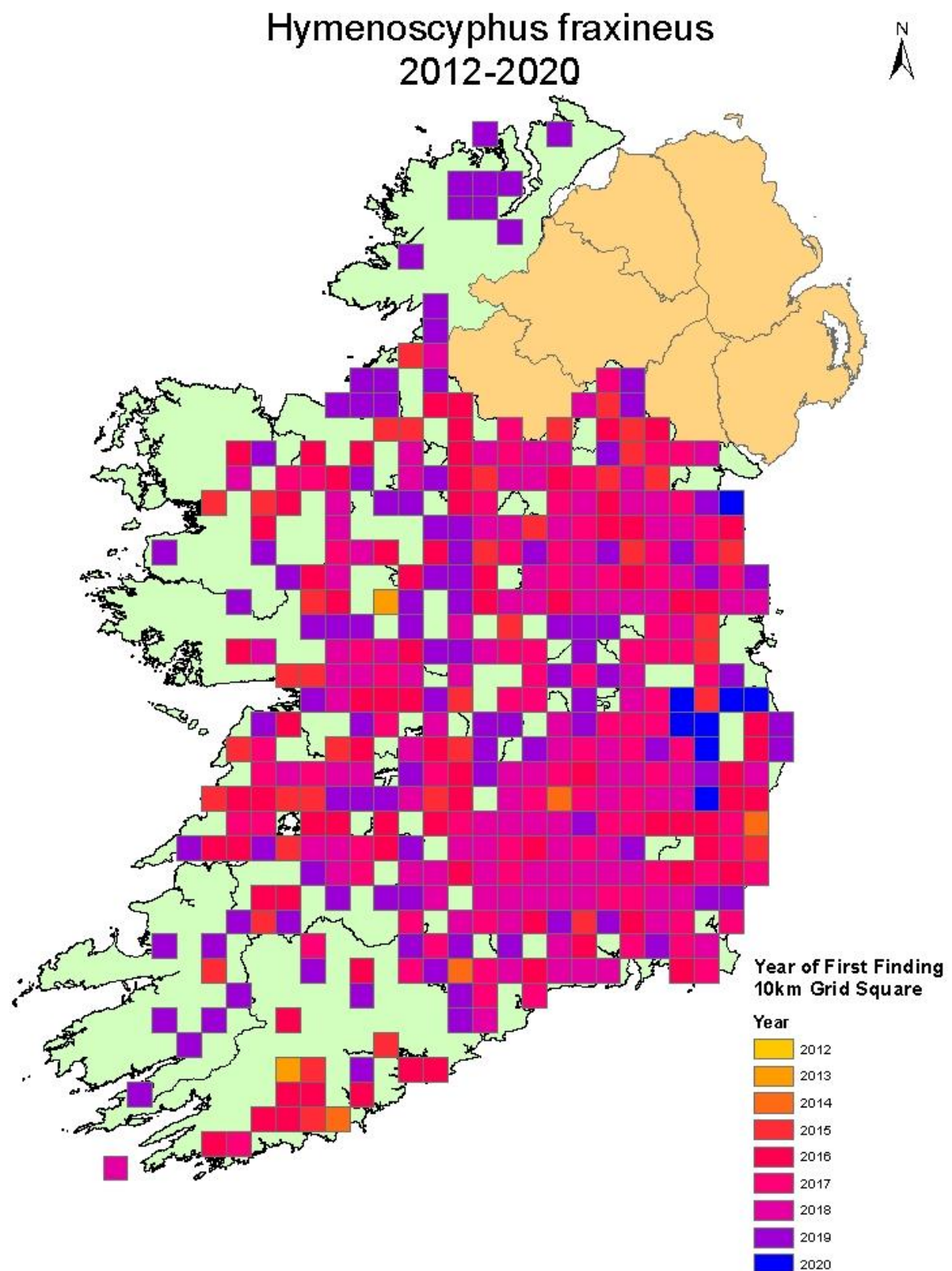


Figure 33. Ash Dieback findings in Ireland 2012 – 2020.

7.2.5 *Phytophthora ramorum*

Since the first finding in Ireland of *Phytophthora ramorum* in Japanese larch in 2010 the Forestry Inspectorate has continued to conduct annual ground and aerial surveys of larch with the assistance of the Air Corps and Coillte. At the start of 2020 the disease had been confirmed present in Japanese larch at 56 forest locations affecting approximately 337ha of forestry (Table 37), up from 53 at the start of the previous year. There were no further forestry findings in Japanese larch in 2020. Since 2010 the Forestry Inspectorate 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 2020. Figure 34 displays the findings as of 31st December 2020 as illustrated on a 10x10km grid square basis.

Table 37. Number of confirmed new site findings in Japanese larch.

Year	Number of findings
2010	8
2011	4
2012	4
2013	10
2014	18
2015	3
2016	1
2017	4
2018	1
2019	3
2020	0

At an EU level the review of the regulatory status of *P. ramorum* continued in 2020 at the Standing Committee on Plant Health and other Commission Working Groups as part of the wider discussions revising the Annexes to the new Plant Health Regulation. The pathogen has been regulated under EU-wide emergency measures since 2002 and there was considerable debate as to whether it should be permanently listed as a quarantine organism under the EU Plant Health regime or whether it should be downgraded to regulated non-quarantine pest (RNQP) status or even deregulated. In 2020 it was determined that non-EU isolates of *P. ramorum* will be treated as Union quarantine pests while EU-isolates will be regarded as RNQPs. This will impact on DAFM policy in relation to the disease.

P. ramorum 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 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. There were two additional findings in 2020 bringing the number of such findings in wild rhododendron to 29.

Phytophthora kernoviae has been detected on wild rhododendron in a number of forest locations. By the end of 2019 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 of *P. kernoviae* in 2020.

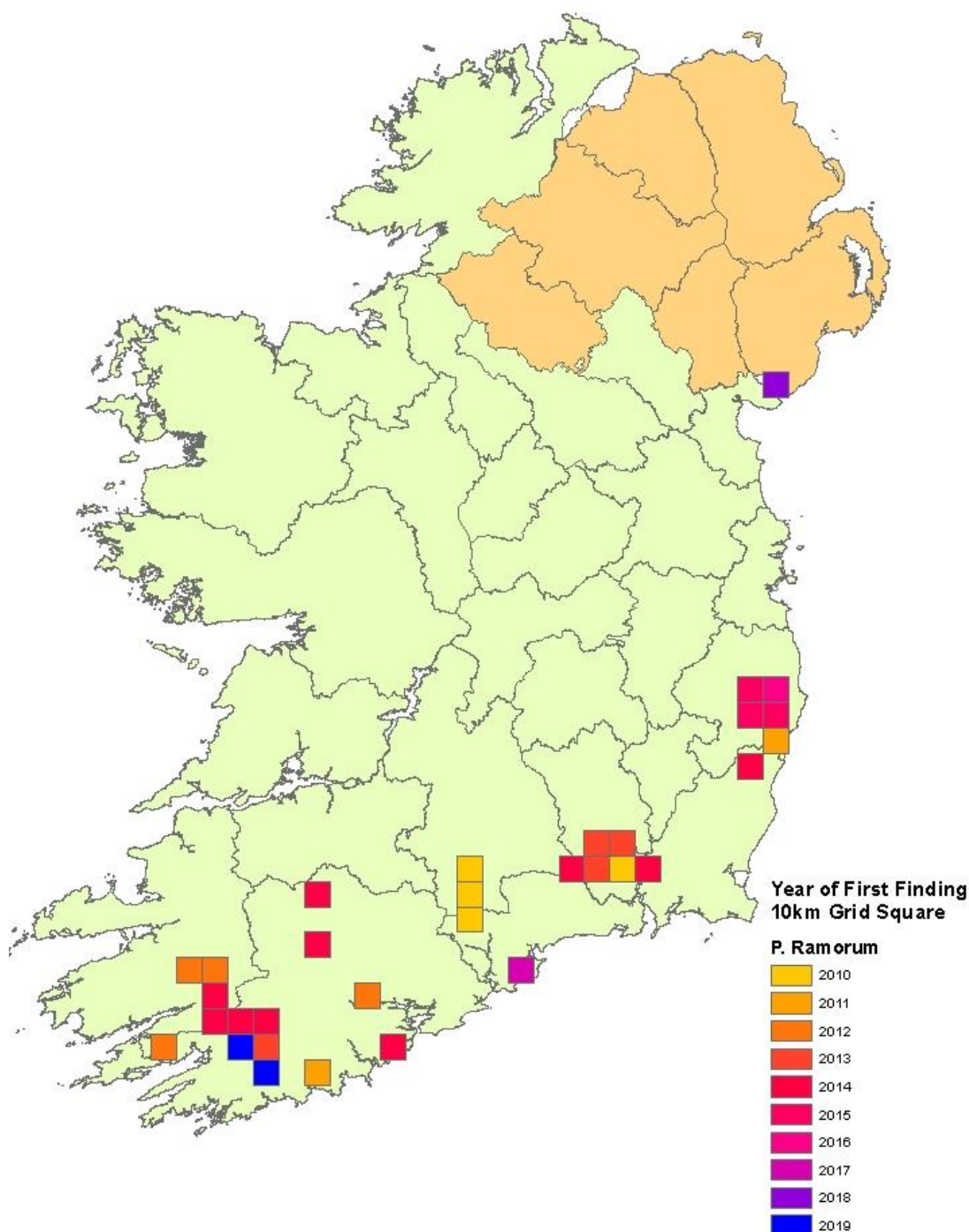


Figure 34. Phytophthora ramorum findings in Ireland 2010-2020.

7.3 EU Plant Health Directive & Protected Zone Monitoring

Import inspections of wood and wood products from Third Countries regulated under the EU Plant Health Regulation are routinely conducted to ensure compliance with entry requirements as part of the Customs clearance process (Tables 38 and 39). In 2020, 675 third country consignments received a documentary check and if appropriate to the requirements, were physically inspected (Table 38). 27 were found to be non-compliant with the import requirements. Appropriate measures were taken where non-compliances were detected depending on the nature of the non-compliance.

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. DAFM operates two designated Border Control Posts in Dublin and Cork ports for forestry 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.

In 2018 the special measures introduced in 2013 by the European Commission regarding inspections of wood packaging material associated with certain stone commodities imported into the EU from China were replaced by a new Commission Implementing Decision (2018/1127/EU) which expanded the range of commodities to be inspected and includes goods from Belarus as well as China. In 2020, 53 containerised consignments from China were routed for inspection. Due to COVID-19 restrictions fewer physical checks than normal were carried out on these consignments. In addition, the Forestry Inspectorate carries out monitoring of Portuguese wood packaging material in relation to the threat of pine wood nematode (as required under Commission Implementing Decision 2012/535 as amended) and wood packaging from other countries.

The Forestry Inspectorate also provides advice and deals 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.

In 2020 Brexit preparedness work continued to be a priority for the Forest Health Section particularly in relation to contingency planning for a post-transition period with no trade deal agreed and the impacts of such an event on imports and exports of forestry products (including wood packaging material) to and from Great Britain. Efforts focussed on developing adequate infrastructure, IT systems and staff to cope with the eventuality of a no trade-deal situation which threatened during the year. In 2020 the Forest Health Section worked with the Department's new Import Controls Operations Division preparing for handover of forestry import controls at specified points of entry - Dublin Port, Dublin Airport and Rosslare Port.

Table 38. Third Country Timber Import Inspections from January to December 2020.

Country	Number of Imports	Not Regulated or Compliant	Non-Compliant
USA	633	610	23
Canada	33	31	2
China	2	2	0
Russia	3	1	2
India	1	1	0
Ukraine	1	1	0
Honduras	1	1	0
Japan	1	1	0
Total	675	648	27

Table 39. Wood Packaging Inspections from Jan to Dec 2020.

Country	Number of Inspections	Compliant	Non-Compliant
China	53	53	0
Other	10	10	0
Total	63	63	0

7.4 IPPC International Standard for Wood Packaging Material

In relation to exports (in addition to import controls), the Forestry Inspectorate is responsible for the implementation of the FAO, IPPC, International Standard for Phytosanitary Measures (ISPM) No. 15, Regulation of 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 subject to a specific phytosanitary treatment (e.g. heat treatment) and each individual unit of the wood packaging material must be marked 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

To the end of 2020, there were 51 companies registered to operate under within the ISPM No. 15 programme in Ireland. Companies in the ISPM No. 15 Programme are subject to Official Controls to ensure compliance with agreed Standard Operating Procedures and that the wood packaging material is fully compliant with the standard.

COVID-19 restrictions impacted on the number of Official Controls carried out in 2020. In the period from January to March 2020 DAFM carried out five Official Controls on registered companies.

7.5 Abiotic

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

7.5.1 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 35 shows the area of forests damaged by fire from 1930 to 2019. In the late 1970's and early 1980's, considerable areas of public forest were burnt. Fire damage levels were high in both public and private forests in 2010 and 2011 following protracted dry periods in spring. The high level of forest fire damage in 2017 is primarily attributed to the Cloosh fire in Co. Galway, which impacted approximately 1,500 ha of forest.

Estimates of fires in privately-owned forests for the periods 1985-2005, 2010-2016 and 2018-2019 were derived by multiplying the proportion of public forest area destroyed by fire each year by the private forest area. In 2017 the private estate was directly estimated due to large single event at Cloosh, which would not be representative of the private estate.

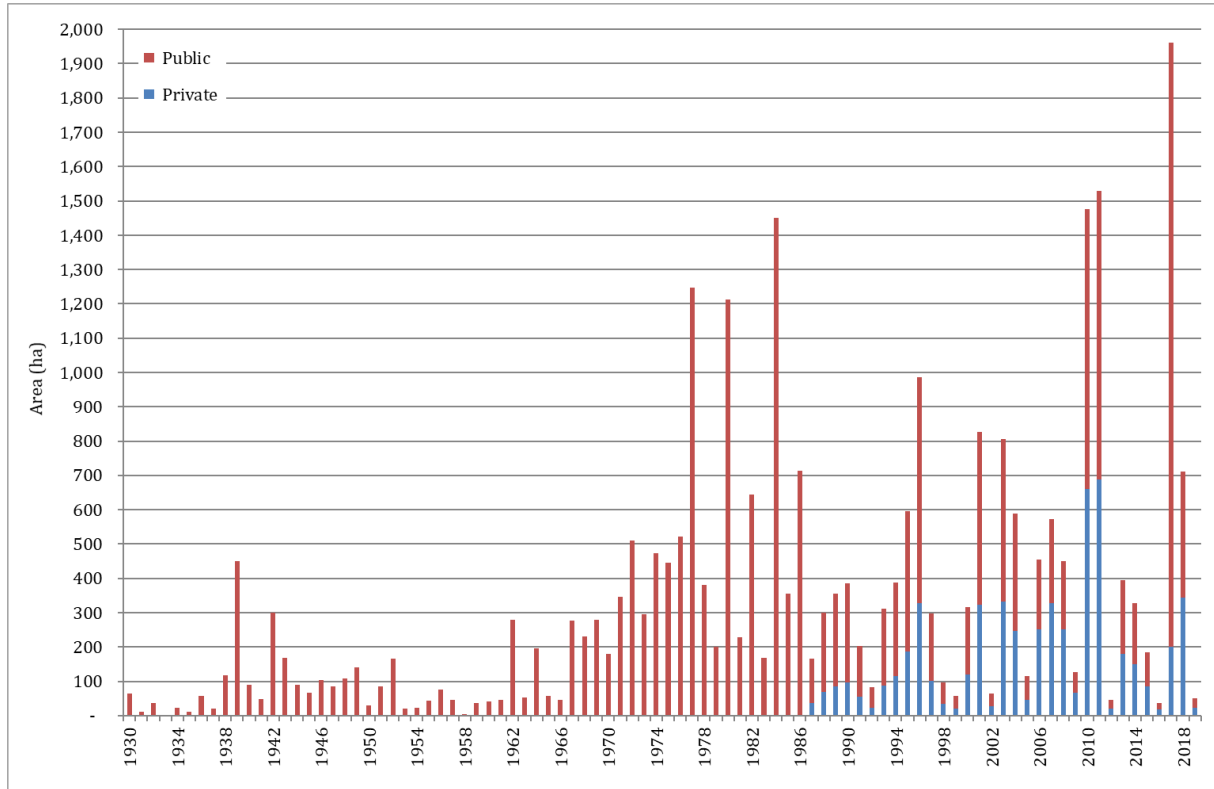


Figure 35. Area of forest damaged by fire 1930-2019.

8. Forest Reproductive Material

DAFM 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 labelled 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 Forestry Inspectorate has been participating in the ongoing EU review of seed and propagating material legislation.

DAFM 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 Issuing of Certificates of Provenance for seed collections
- Advice on forest seed and plant regulations

DAFM 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 seeds and plants may also be subject to the requirements of EU Regulation 2016/2031, the Plant Health Regulation. This regulation replaced Council Directive 2000/29/EC (commonly referred to as the Plant Health Directive) in December 2019 with an aim to modernise the plant health regime and provide more effective measures for the protection of the Union's territory and its plants and forests from destructive pests and disease.

Key statistics

- 119 Seed Collection Permits and 75 Master Certificates of Provenance were issued in 2020 in relation to home collected forest reproductive material.
- 7 new sources of forest basic material were added to the National Register of Basic Material in 2020. The total area on the register at the end of 2020 was 4,604 ha.
- Limited volumes of acorns were collected from home sources in 2020 due to an indifferent seed year. Infrequent mast years are common in oak species due to range of climatic and genetic factors.
- The majority of pedunculate oak acorns were sourced from '*Selected*' Stands of Dutch provenance, while the majority of sessile oak acorns were sourced from '*Source Identified*' Stands of Irish provenance.
- There has been a considerable year on year increase in the amount of '*Qualified*' downy birch seed sown in Irish forest tree nurseries.
- Increasingly improved seed (*Qualified*' and '*Tested*') is being utilised for the main conifer species: Sitka spruce, Norway spruce, Douglas fir and Scots pine.
- Seed orchards established under The Irish Sitka spruce Tree Improvement Programme in 2011 produced their first major crop in 2019. Over 16 kg from this harvest were sown in 2020, equating to approximately 1.6 million plants. This was supplemented with 2 million plants produced by vegetative propagation from improved hedge orchards.

8.1 *Seed Collection permits and master certificates of provenance*

In 2020, 119 Seed Collection Permits were issued – an increase on the previous year (99 issued in 2019). During 2020, 75 Master Certificates of Provenance were issued (20 issued in 2019). These figures vary from year to year depending on availability of suitable seed and levels of demand.

8.2 *National Register of Approved Basic Material*

In accordance with EC Directive 1999/105/EC, each EU Member State holds a national register of approved forest basic material. DAFM is responsible for the national register and updates it annually. New entities are evaluated according to criteria described in the Directive and following inspection entered on the register according to four different categories.

- *Source identified:* Reproductive material derived from basic material which may be either a seed source or stand located within a single region of provenance.
- *Selected:* Reproductive material derived from basic material which shall be a stand located within a single region of provenance, which has been phenotypically selected at the population level.
- *Qualified:* Reproductive material derived from basic material which shall be seed orchards, parents of families, clones or clonal mixtures, the components of which have been phenotypically selected at the individual level and which meets certain prescribed requirements
- *Tested:* Reproductive material derived from basic material which shall consist of stands, seed orchards, parents of families, clones or clonal mixtures. The superiority of the reproductive material must have been demonstrated by comparative testing or an estimate of the superiority of the reproductive material calculated from genetic evaluation of the components of the basic material.

The total area of forest basic material on the National Register of Approved Basic Material at the end of 2020 stands at 4,604 ha (Table 40).

Table 40. Summary of the 2020 National Register of Approved Basic Material by forest reproductive material category and area (ha).

Species	Source Identified	Selected	Qualified	Tested	Total
<i>Abies procera</i>	-	13	-	-	13
<i>Acer pseudoplatanus</i>	-	54	3	-	57
<i>Alnus cordata</i>	-	1	-	-	1
<i>Alnus glutinosa</i>	113	0	2	-	115
<i>betula pubescens</i>	30	13	0	-	44
<i>Castanea sativa</i>	-	8	2	-	10
<i>Chamaecyparis lawsoniana</i>	-	3	-	-	3
<i>Cryptomeria japonica</i>	3	-	-	-	3
<i>Cupressus macrocarpa</i>	-	1	-	-	1
<i>Fagus sylvatica</i>	3	79	-	-	82
<i>Fraxinus excelsior</i>	136	22	4	-	162
<i>Larix decidua</i>	-	17	-	-	17
<i>Larix kaempferi</i>	-	37	-	-	37
<i>Larix x eurolepis</i>	-	-	3	-	3
<i>Mixed Species Stands</i>	53	-	-	-	53
<i>Picea abies</i>	-	290	-	-	290
<i>Picea sitchensis</i>	-	469	7	3	480
<i>Pinus contorta</i>	-	105	2	-	108
<i>Pinus nigra</i> var. <i>maritima</i>	-	63	-	-	63
<i>Pinus radiata</i>	-	19	-	-	19
<i>Pinus sylvestris</i>	37	162	5	-	204
<i>Prunus avium</i>	-	-	0.8	-	0.8
<i>Pseudotsuga menziesii</i>	-	233	-	-	233
<i>Quercus petraea</i>	1,064	541	-	-	1,605
<i>Quercus robur</i>	536	384	-	-	920
<i>Sequoia sempervirens</i>	1	-	-	-	1
<i>Taxus baccata</i>	34	-	-	-	34
<i>Thuja plicata</i>	-	19	-	-	19
<i>Tsuga heterophylla</i>	-	28	-	-	28
Total	-	13	-	-	13

8.3 Utilisation of Forest Reproductive Material in Afforestation and Reforestation

Tables 41 and 42 summarise data on seed used in Irish forest nurseries for the period 2016-2020 for broadleaf and conifer species respectively²². Table 43 lists kgs of seed used in Irish forest nurseries in 2019 by FRM category.

Table 41. Main broadleaf species sown (kgs seed & number of plants ('000)) in forest nurseries (2016-2020).

Species	2016		2017		2018		2019		2020	
	kg	Plants ('000)	kg	Plants ('000)	kg	Plants ('000)	kg	Plants ('000)	kg	Plants ('000)
<i>Acer pseudoplatanus</i>	100	141	153	214	15	21	95	133	50	70
<i>Alnus glutinosa</i>	117	3,510	113	3,387	92	2,754	118	3,525	134	4,023
<i>Betula pendula</i>	10	300	7	204	8	227	8	225	6	193
<i>Betula pubescens</i>	49	2,192	54	2,439	52	2,343	60	2,700	55	2,490
<i>Fagus sylvatica</i>	466	373	1041	832	683	546	870	696	1,170	936
<i>Fraxinus excelsior</i>		-		-	-	-	-	-	6	15
<i>Quercus petraea</i>	190	15	5,363	429	4,269	342	1,400	112	27	22
<i>Quercus robur</i>	24,635	2,464	20,663	2,066	25,302	2,530	15,406	1,541	2,530	202

Table 42. Main conifer species sown (kgs seed & number of plants ('000)) (2016-2020).

Species	2016		2017		2018		2019		2020	
	kg	Plants ('000)	kg	Plants ('000)	kg	Plants ('000)	kg	Plants ('000)	kg	Plants ('000)
<i>Larix decidua</i>	-	-	0.3	16	0.3	15	0.4	18	0.30	15
<i>Picea abies</i>	84	3,340	101	4,024	91	3,643	104	4,154	0.38	19
<i>Picea sitchensis</i>	326	32,585	280	27,986	247	24,680	380	37,950	85	3,400
<i>Pinus contorta</i>	17	1,530	23	2,030	22	1,983	25	2,247	38	3,421
<i>Pinus sylvestris</i>	32	1,278	67	2,685	80	3,197	46	1,834	16	630
<i>Pseudotsuga menziesii</i>	18	438	20	490	19	481	30	745	40	1,003
<i>Tsuga heterophylla</i>	0.5	38	0.5	37	0.6	44	0.4	28	-	-

²² Data on seed utilisation were sourced from Coillte CGA and None-So-Hardy (Forestry) LTD. Data inclusive of subsequent sales to horticulture sector and plants for export.

Table 43. Main conifer and broadleaf sown (kgs seed & number plants ('000)) in 2020 by species and FRM category.

Species	Source ID		Selected		Qualified		Tested	
	kg	Plants ('000)	kg	Plants ('000)	kg	Plants ('000)	kg	Plants ('000)
<i>Acer pseudoplatanus</i>	50	70	-	-	-	-	-	-
<i>Alnus glutinosa</i>	6	180	126	3,777	2	66	-	-
<i>Betula pendula</i>	1	43	5	150	-	-	-	-
<i>Betula pubescens</i>	32	1,422	14	623	10	444	-	-
<i>Fagus sylvatica</i>	-	-	1,170	936	-	-	-	-
<i>Fraxinus excelsior</i>	6	15	-	-	-	-	-	-
<i>Larix decidua</i>	-	-	-	-	-	-	0.3	15
<i>Larix x eurolepis</i>	-	-	0.1	7	0.3	13	-	-
<i>Picea abies</i>	-	-	55	2,200	30	1,200	-	-
<i>Picea sitchensis</i>	5	490	28	2,817	-	-	236	23,556
<i>Pinus contorta</i>	-	-	35	3169	3	252	-	-
<i>Pinus sylvestris</i>	-	-	5	200	1	30	10	400
<i>Prunus avium</i>	26	21	1	1	-	-	-	-
<i>Pseudotsuga menziesii</i>	5	125	3	76	-	-	32	802
<i>Quercus petraea</i>	1,781	142	749	60	-	-	-	-
<i>Quercus robur</i>	-	-	22,822	2,282	-	-	3,658	366

9. International comparators

9.1 Introduction

This chapter compares the status of Irish forests with European and global forests. Comparisons are primarily from 2020 when the FAO *Global Forest Resources Assessment* and the *State of Europe's Forests* were published. Also presented are figures on roundwood harvest, increment and forest expansion in the EU 27. Please note that both of these reports only provide figures up to 2015 for the statistics in this chapter.

Key statistics

- At 11.4%, forest cover in Ireland in 2020 was one of the lowest in the EU 27, where the average forest cover was 38.3%; Worldwide forest cover was 31.1%;
- In 2020, public forest ownership in Ireland was at 54%, close to the EU average of 53.5%;
- Annual roundwood harvest was 4.7 million m³, compared with an EU average of 21.8 million m³ in the same year (2015 data);
- Fellings represented at 64.5% of annual increment in 2015, which was slightly below the EU average of 66.8%;
- Of all the EU Member States, since 1990 Ireland has had the highest rate of increase in forest expansion as a percentage of total forest cover.

9.2 Global & EU 27 Forest Cover

Despite having afforested more than 320,000 ha since 1990, Ireland remains one of the least forested countries in Europe. In 2020, when the FAO *Global Forest Resources Assessment* was published, Ireland had 11% forest cover, compared with a total forest cover of 38.3% in the EU 27 and a 31.1% forest cover worldwide (Figure 36). The total forest area and the percentage of forest cover in European countries is detailed in Figures 37 and 38.

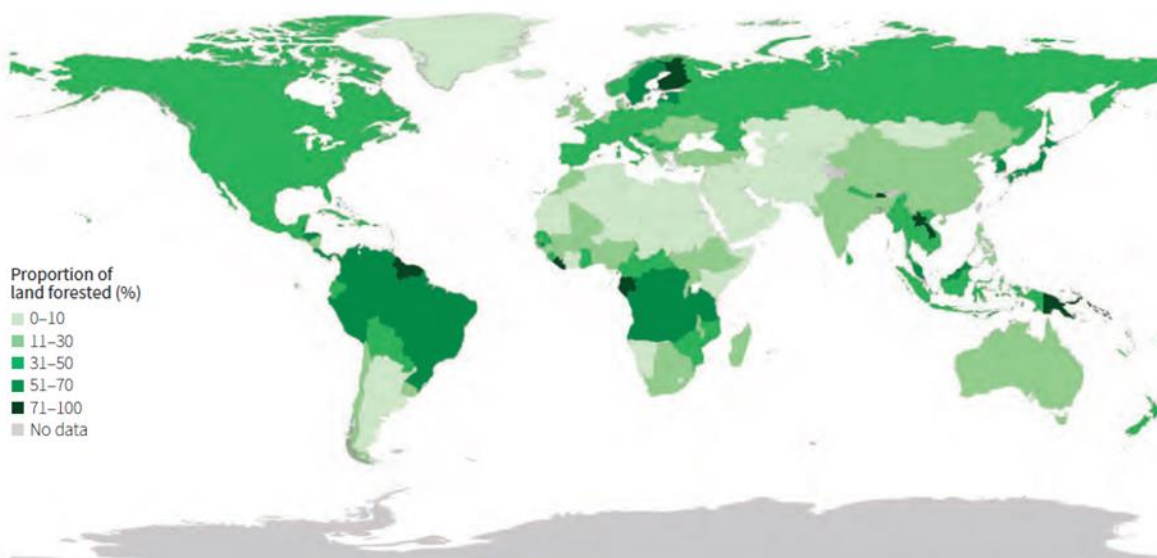


Figure 36. Forest area as a percentage of total land area (Source: FRA 2020).

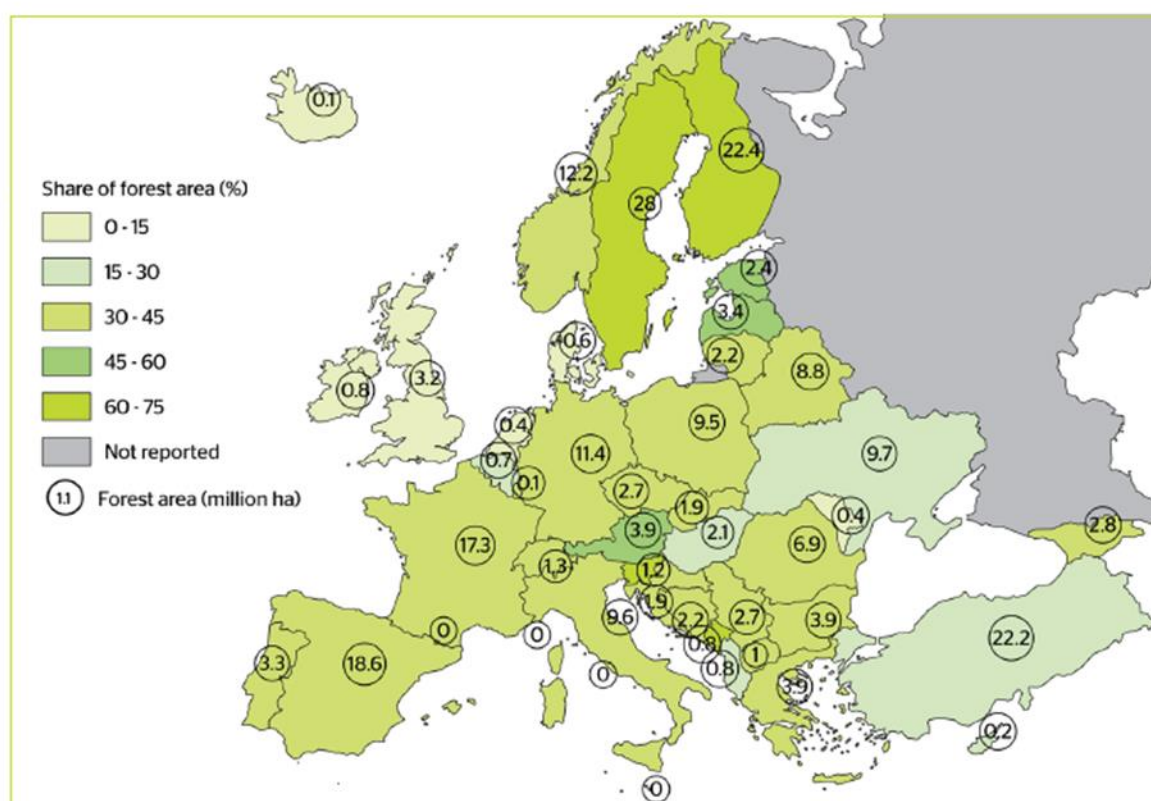


Figure 37. Forest area (million ha) and share (percentage) of country forested (Source: State of Europe's Forests 2020).

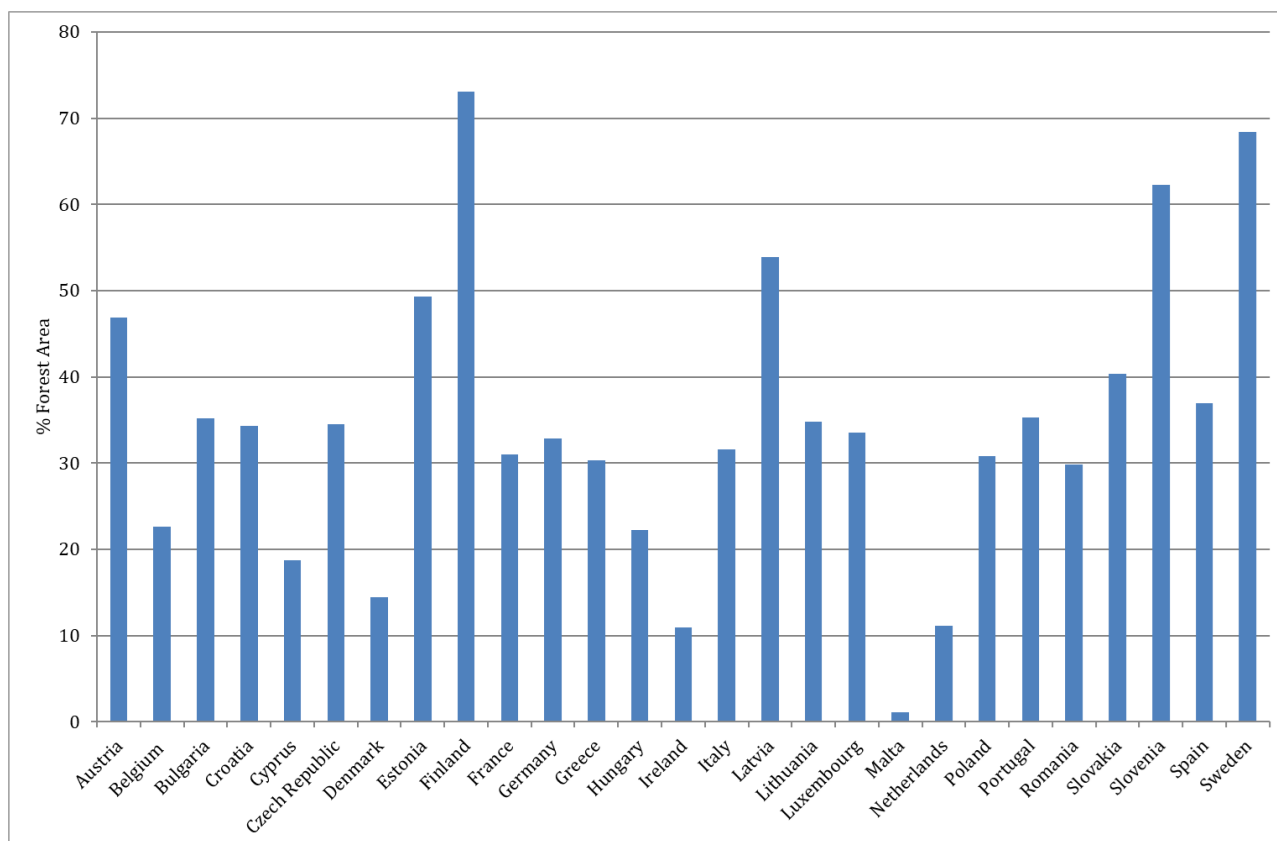


Figure 38. Forest cover in EU 27 (Source: State of Europe's Forests 2020).

9.3 Forest comparison: EU 27

The *State of Europe's Forests* reports on the status and trends in European forests and offers a comparison of Irish forests with European counterparts. In 2020 at the time of the latest report, public forest ownership in Ireland was at 54%, close to the EU average of 53.5% (Figure 39). Due to afforestation, the proportion of privately owned forest is increasing in Ireland. Germany has the highest total growing stock of the EU 27, at over 3.6 billion m³ (Figure 40).

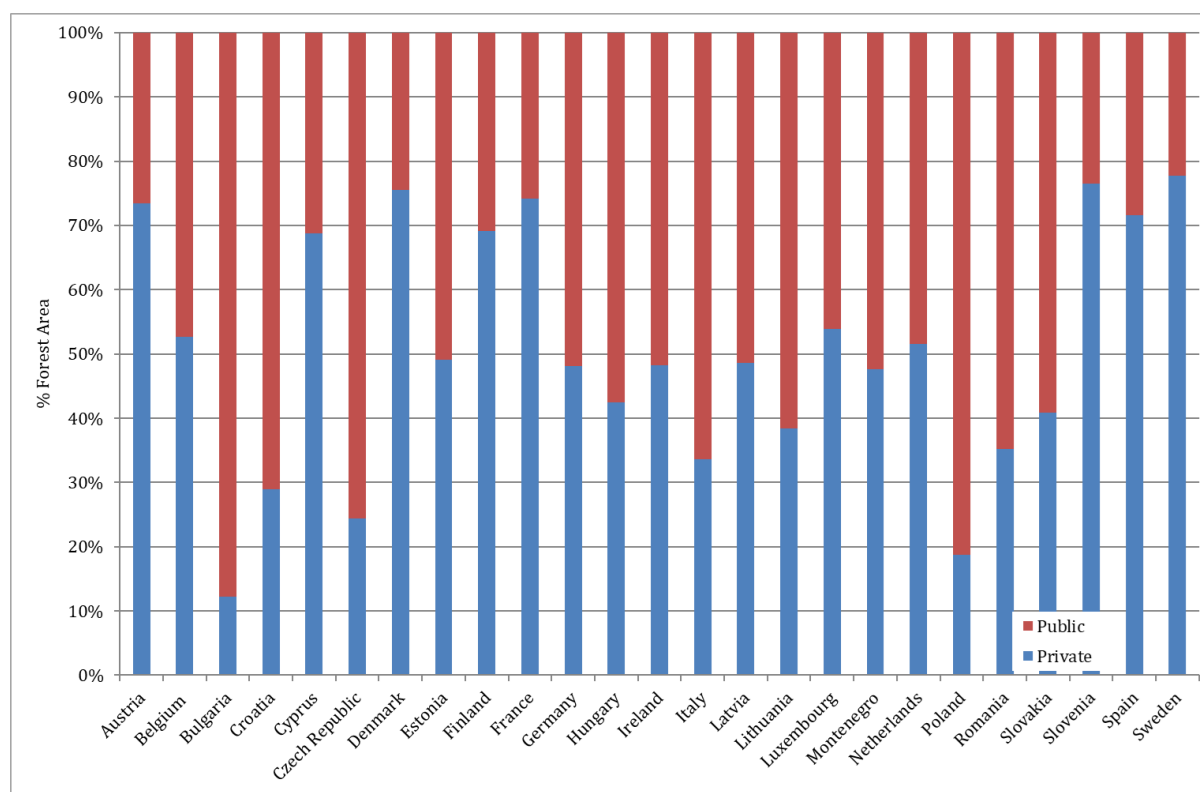


Figure 39. Forest ownership in the EU 27 (*State of Europe's Forests 2020*).

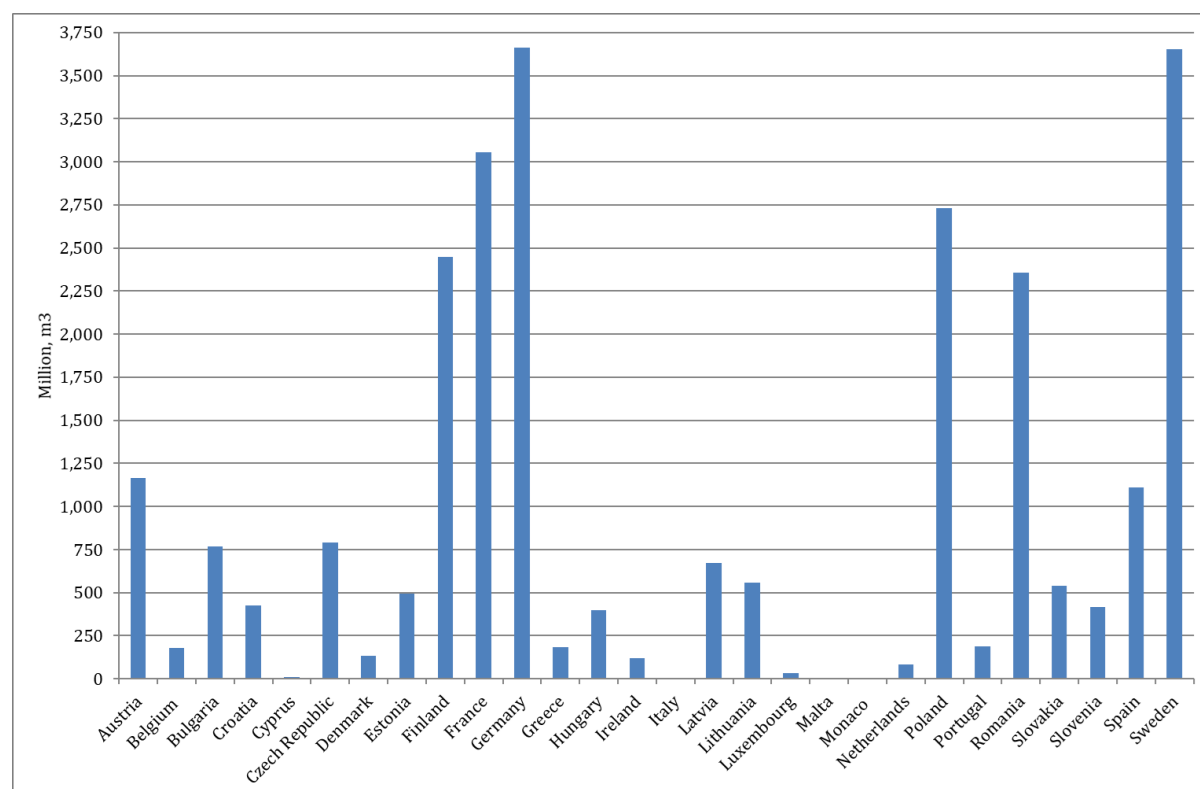


Figure 40. Growing stock in the EU 27 countries (*State of Europe's Forests 2020*).

Annual roundwood harvest at 4.7 million m³ in 2015 compares with an EU average of 21.8 million m³ in the same year (Figure 41). Fellings represented at 64.5% of annual increment in 2015, which was slightly below the EU average of 66.8% (Figure 42). Please note that the State of Europe's Forests 2020 only includes reports on these metrics up to 2015.

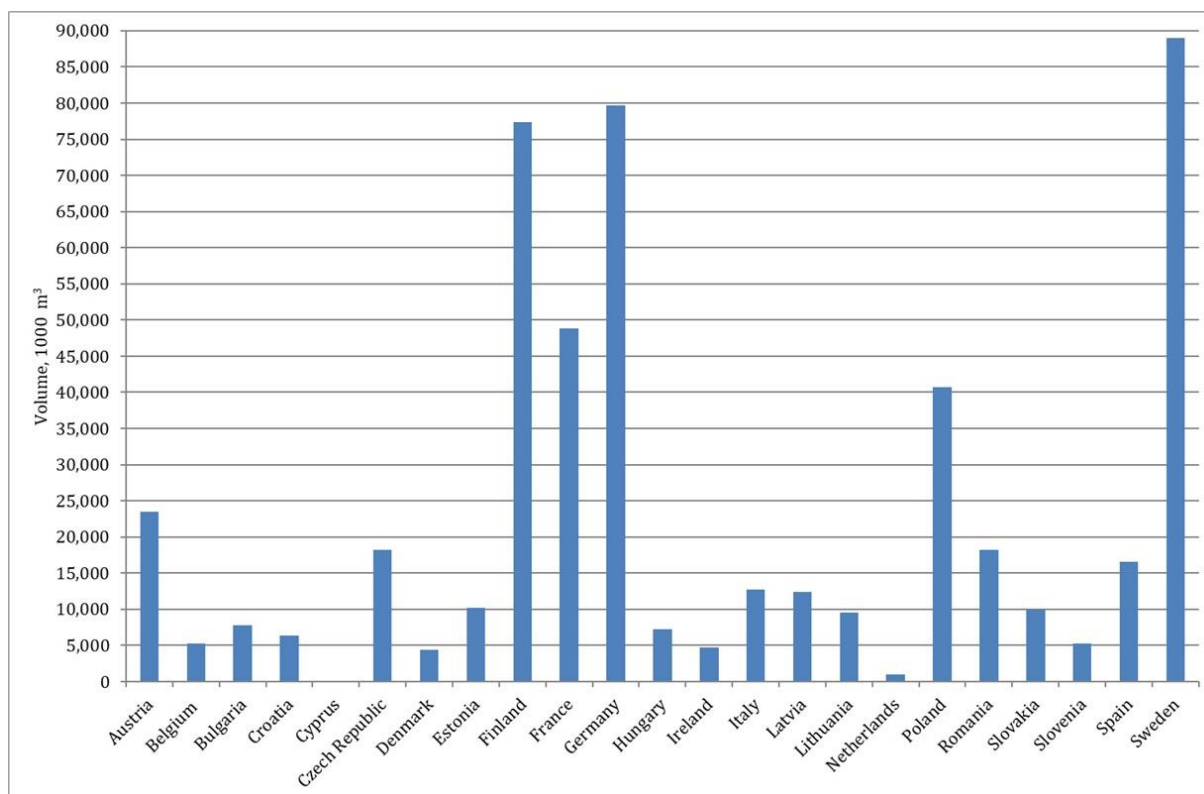


Figure 41. Felling volumes in the EU 27 (*State of Europe's Forests 2020*).

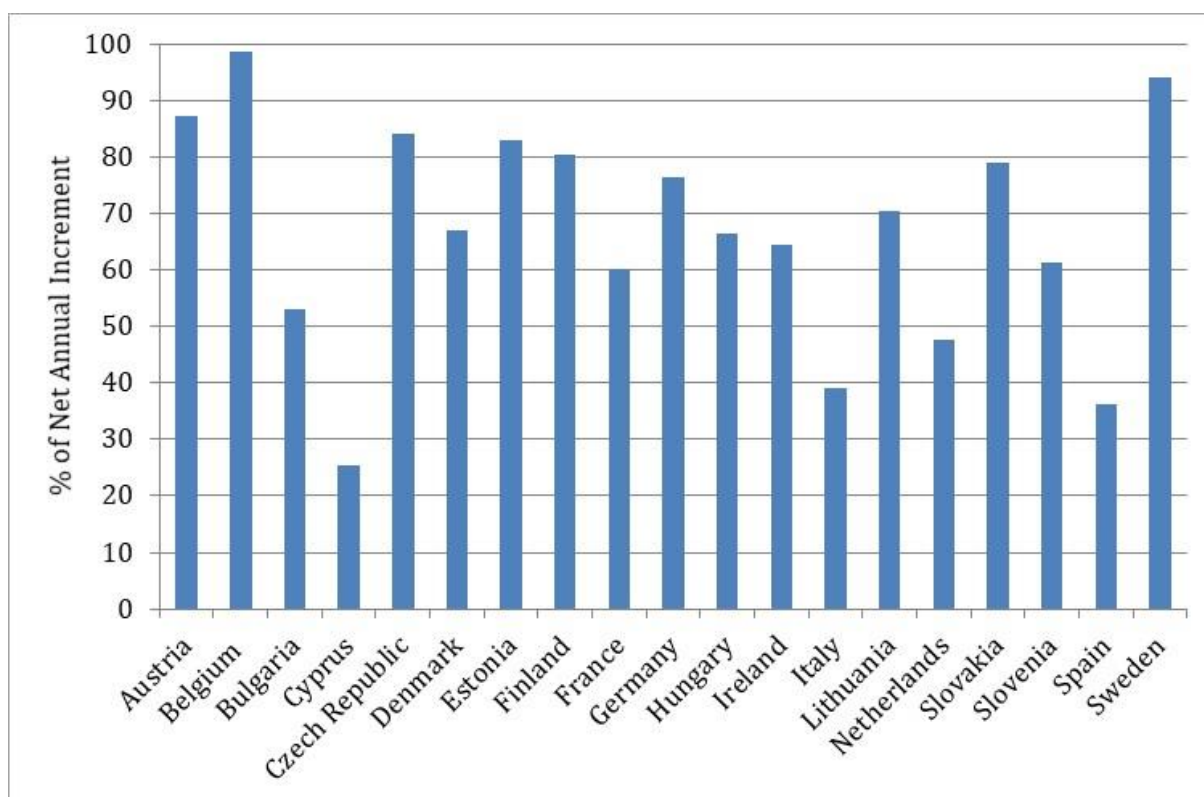


Figure 42. Harvest as a percentage of net annual increment (*State of Europe's Forests 2020*).

9.4 European Forest Expansion Rate

According to the *State of Europe's Forests 2020* report, since 1990 Spain has had the greatest annual expansion of forests at 156,000 ha, France at 94,000 ha and Turkey at 81,000 ha. The annual rate of change, expressed as a percentage of total forest area is highest for Iceland (3.7%), Ireland (1.8%) and Spain (1.0%) for the period 1990-2020 (Figure 43).

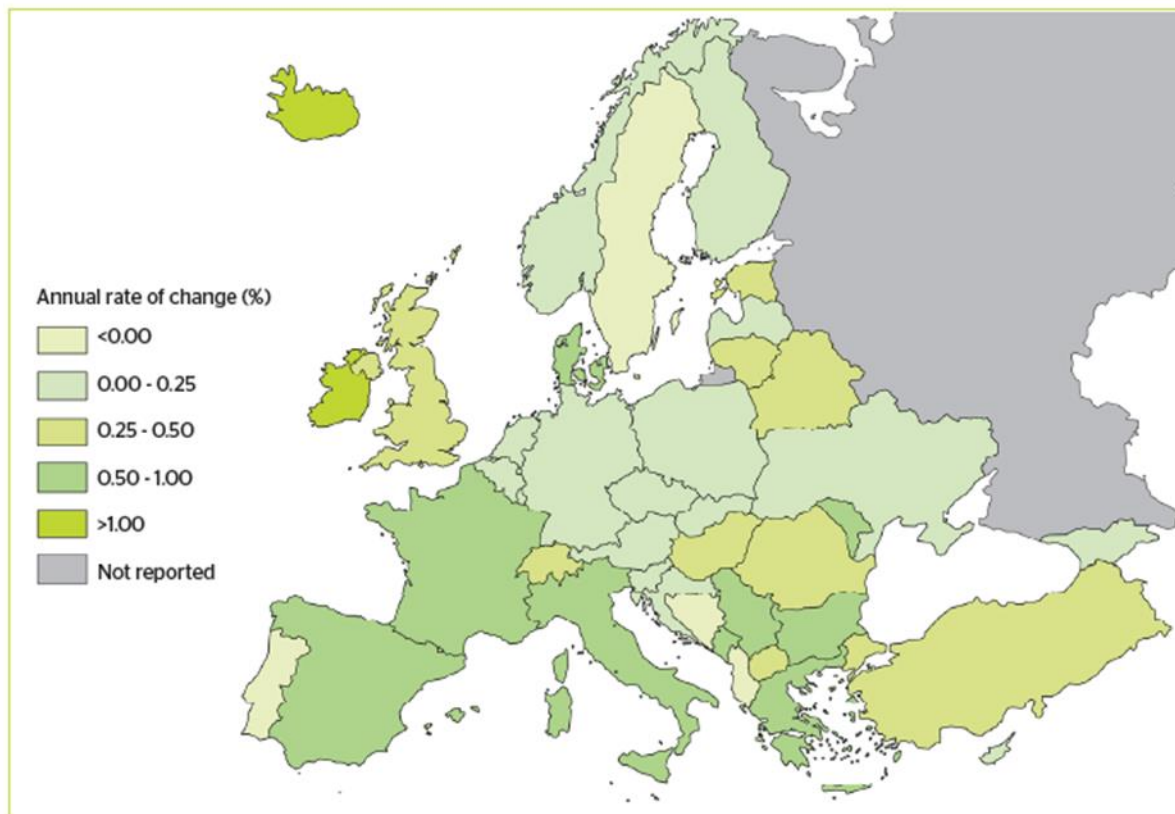


Figure 43. Annual rate of change (%) in forest area by country 1990-2020 (*State of Europe's Forests 2020*).

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