

Our Draft Sustainable Growth & Value Strategy 2027-2031

Introduction to Natural Resources Wales

Natural Resources Wales is the biggest Welsh Government Sponsored Body and our work to protect and enhance Wales's natural environment impacts everything that matters most -our communities, our wildlife, and our future.

We are custodians of more than 120,000 hectares, 7%, of Wales's land, including the Welsh Government Woodland Estate, flood defences, and National Nature Reserves. It is our duty to pursue the Sustainable Management of Natural Resources (SMNR) as laid out in the Environment (Wales) Act 2016.

We have a [Corporate Plan to 2030: nature and people thriving together](#). It sets out where we are best placed to make a difference within the resources we have, but also where we will need to adapt how and where we work, and innovate and collaborate to bring about a change that is fair, just, and ensures nobody gets left behind.

Our vision is for nature and people thriving together. Our well-being objectives are that by 2030 in Wales:

- nature is recovering
- communities are resilient to climate change
- pollution is minimised

Natural Resources Wales's commercial function

Our commercial function is in the Customer, Communication and Commercial Directorate and crosscuts all other directorates in our organisation.

Our vision is for growth and value of our resources to allow investment back into our core mission so that by 2030 in Wales nature is recovering, communities are resilient to climate change and pollution is minimised.

Our Draft Sustainable Growth and Value Strategy 2027-2031

Our Draft Sustainable Growth and Value Strategy sets out how we plan to grow our income, increase the value we deliver, and improve efficiency, while staying true to our environmental purpose.

This draft represents our current direction of travel – and now we want to hear from you. We are asking our staff, partners, stakeholders, customers, and the communities we serve:

- Does this direction feel right?
- Are there opportunities we have missed?
- What ideas do you want us to explore?

You can share your views [online](#) and at targeted engagement events in February and March 2026.

You can also contact us by:

- Calling [0300 065 3000](tel:03000653000) (Mon-Fri, 9am-5pm).
- Emailing commercial@cyfoethnaturiolcymru.gov.uk

The deadline for feedback is Sunday 08 March 2026. We will use what we hear to refine the strategy before presenting a final version to our Board in April 2026.

Our objectives

Our Growth & Value Strategy aims to:

- show our commitment to the sustainable management of natural resources and the land we care for
- make clear how commercial activity supports our [Corporate Plan to 2030](#) and [Well-being Statement](#),
- ensure we deliver value for money for the public purse, while contributing to a stronger, greener Welsh economy
- support nature recovery, improve access for communities, and contribute to a resilient, sustainable future built on green growth

These long-term commercial objectives are aligned to legislation we are required to act within, such as Environment Act Wales 2016, Future Generations Act Wales 2015 Natural Resource Act Wales 2013, Forestry Act 1967, as well as the Welsh Government's requirements of us, which are expressed in a Remit Letter from each new government.

They are also aligned with our financial strategy to operate within a balance budget and secure finances to support our core mission and well-being goals in the long term. This is complemented by our Procurement and Contracts Strategy 2026-2031, which addresses the themes of fair work, equality, and diversity; modern slavery prevention, value for money; and governance, compliance, and innovation.

These objectives will also support us uphold standards and certification for the woodlands we manage on behalf of Welsh Ministers to ensure continued improvement to the forest environment for people, nature and the forest industry.

They will contribute towards the Welsh Government's commitment to halt and reverse the loss of nature by 2030 by protecting and effectively managing 30% of our land and sea for nature, known as "[30 by 30](#)".

Our contribution to an all-Wales action to increase renewable energy production will also enable and facilitate others in presenting opportunities for green / sustainable growth and tackling the climate and nature emergencies we now face.

The objectives are designed in a way to be responsive across potential successive governments or new government programmes.

How we will deliver our strategy

During this strategy period, 2027 to 2031, we will prioritise and focus our work in four key areas:

- **Business development**, by exploring new and emerging opportunities for innovation, green finance, process improvement and defining our role in the rural land map and land-use plan for Wales.
- **Commercial and recreation**: focusing on enabling inclusive, sustainable outdoor access to appropriate land in our care benefiting people's well-being whilst protecting nature.
- **Renewable energy**, by enabling and facilitating growth and development, working with Trydan Gwyrdd Cymru and other developers.
- **Timber sales and marketing plan, 2027-2031**, providing assurance of supply for our customers and wood processors in Wales, alongside maximising social and environmental value to the WGWE.

In this draft strategy, we provide clarity of our roles and purpose in each of the four areas and our commitment to what we intend to deliver.

The principles and contribution to a circular economy for Wales – meaning we seek to reuse and regenerate materials or products in a sustainable or environmentally friendly way – will be embedded through all our work.

All activities, planned and reactive, will align with [Corporate Plan to 2030](#) and [Well-being Statement](#), whilst meeting legislative requirements.

Each area will also have an action plan to support delivery and performance indicators of our work. This is already in draft for our [Timber Sales and Marketing Action Plan](#) and we welcome your views on that supporting document as part of this engagement.

Action plans for the other three areas of work are in development and will be responsive to what we hear during engagement on this strategy.

Engagement and collaboration

We will work collaboratively with our staff, partners, stakeholders, industry groups, and communities to pool our collective insight, knowledge and expertise, build trust, and work together on shared goals.

We work closely across a range of Welsh Government portfolios, including Climate Change and Rural Affairs, inclusive of landscapes, nature and forestry teams, Economy and Energy, and the Sponsorship Team.

Internally, we will continue to work closely with a variety of departments and Subject Matter Experts, ensuring that we include their legislative requirements and/or risk management approaches as part of our processes or built into our agreements and contracts in all business areas.

Managing risk and horizon scanning

Our strategy embraces a proactive and adaptive approach to risk management so we can remain resilient and responsive to emerging societal and global opportunities and threats.

Through continuous horizon scanning, we will maintain the agility to refocus and evolve our ways of working, while upholding compliance and delivering consistently against our corporate plan and statutory obligations.

We will work within our organisational risk appetite, - making decisions that balance opportunity with responsibility. This means taking an appropriate level of risk where it supports our goals, whilst staying mindful of the inherent risks in our activities.

We will foster a culture of creativity and innovation, empowering our team and colleagues to be ambitious in their thinking and actions. We will be bold in trying new approaches and if they are not as successful as planned, we will view them as valuable learning opportunities that strengthen our organisation.

Business development plan

Context and how we will work

We will approach new and innovative business development ideas that use a blend of funding and delivery approaches. This could be combining core funding with grants, partnerships, contracts and other external sources – so we aren't reliant on just one type funding.

Ideas, and potential Business Cases, will need to be viable and realistic and:

- show our commitment to the sustainable management of natural resources and the land we care for
- make clear how they support our [Corporate Plan to 2030](#) and [Well-being Statement](#),
- ensure we deliver value for money for the public purse, while contributing to a stronger, greener Welsh economy

- support nature recovery, improve access for communities, and contribute to a resilient, sustainable future built on green growth.

Proposals will be evaluated consistently by using our Sustainable Management of Natural Resources Toolkit.

We will seek support from the Cabinet Secretary for Climate Change and Rural Affairs and work across the Government to progress business development activities and to be responsive to new government ambitions and targets.

Key commitments for 2027-2031

- **Innovation:** We will explore new and innovative ideas for our business, specifically for green finance, asset management, and commercial business process improvements.
- **Green finance including supporting woodland creation growth:** We will develop an action plan to address recommendations made from a forestry deep-dive in Wales: [Trees and Timber Deep Dive | GOV.WALES](#) and opportunities to grow the Welsh Government Woodland Estate, aligned with the Welsh Government's ambitions for the forest network.
- **Sustainable land use:** We will support key stakeholders in identifying new delivery mechanisms to increase the area and improve the quality of the Welsh Government Woodland estate. We will achieve this by contributing to a rural land map and land-use plan as well as clarifying our role in enabling sustainable commercial development opportunities on land in our care.
- **Case studies as demonstrators:** We will develop and publish case studies of our work to encourage and promote innovation, evidence outcomes achieved and lessons learnt and use these to build confidence and develop future opportunities.
- **Pilot schemes & co-funding:** We will develop pilots for innovative approaches to the management of the Welsh Government Woodland Estate and National Nature Reserves. We will also invite proposals from others to collaborate and develop a template for funding mechanisms between the public and private sector.
- **Investment appraisal:** We will create financial investment appraisal tools to support our decision making in investment and new funding opportunities.

Commercial recreation plan

Context and how we will work

Our commercial recreation plan will focus on enabling inclusive, sustainable outdoor access to benefit people's well-being whilst protecting nature, in line with our Recreational Strategy: [Natural Resources Wales / Recreation strategy: how we manage access to nature on the land in our care 2024-2030](#).

We will shift from direct provision to partnership delivery. A mixed economy model approach will be taken, blending elements of private enterprise with government support, to provide public services and benefit our communities.

To be most effective, we will pursue opportunities for commercial recreation that:

- show our commitment to the sustainable management of natural resources and the land we care for
- support our [Corporate Plan to 2030](#) and [Well-being Statement](#),
- ensure we deliver value for money for the public purse, while contributing to a stronger, greener Welsh economy
- support nature recovery, improve access for communities, and contribute to a resilient, sustainable future built on green growth

By doing this we will contribute to broader goals such as Welsh Government's commitment to halt and reverse the loss of nature by 2030, known as "[30 by 30](#)", climate action, nature connection for all, and aligning with Welsh Government well-being goals: [Wellbeing of Wales: 2025 | GOV.WALES](#).

We are open to explore new and innovative viable recreational development on the Welsh Government Woodland Estate, which is open for foot access on its freehold estate and, in most places, extended to access for non-motorised cycle and horse-riding.

We note some of the estate is held as leasehold where recreation access may be restricted. Recreation access and commercial activities may require landlords' consent and will demand negotiations with landlords to pursue such commercial recreational proposals.

We already offer access to some forest areas for commercial horse-riding activities, and we are committed to a continuation of such existing arrangements within each contractual period.

Key commitments for 2027-2031

- **Pipeline and re-investment:** We will seek new commercial opportunities to enhance and expand our recreational offer on land in our care. Where income is generated from the Welsh Government Woodland Estate, we will explore how we re-invest income back to local forests.
- **Benefit-based prioritisation:** When we consider new commercial recreational proposals, we will prioritise opportunities which complement and benefit local communities and the management of the Welsh Government Woodland Estate.
- **Visitor Centres:** We will enable and facilitate other organisations or businesses to operate visitor centres, and potential surrounding areas, on our formal recreation sites, to enhance the visitor experiences whilst protecting nature.
- **Media and filming offer:** We will enhance our current offer of media and filming opportunities on the land in our care. We will review our current operating model and fee structure, in support of the Welsh Government's film and media policy.
- **Case studies as demonstrators:** We will develop and publish case studies of our enabling work with partners to encourage and promote commercial recreation on the land in our care and use these to build confidence and future opportunities.

Renewable energy

Context and how we will work

We manage the Welsh Governments Woodland Estate, (WGWE), on behalf of the Welsh Government, enabling renewable energy schemes on the public forest estate to support a sustainable future.

We recognise the opportunities renewable energy development on the land in our care can bring to embed the Sustainable Management of Natural Resources (SMNR), help address the nature emergency, and contribute to economic growth and skilled employment.

We will continue to manage the existing commercial agreements for renewable energy schemes on behalf of the Welsh Government. In doing this we provide landlord and tenant relations, sound financial accounting, and maintenance of our built assets.

We already work closely with Trydan Gwyrdd Cymru which is a publicly owned company, established by the Welsh Government, to develop renewable energy projects in Wales.

Key commitments for 2027-2031

- **Exemplar agreement with Trydan Gwyrdd Cymru:** We will develop our working with Trydan Gwyrdd Cymru, enabling further renewable energy schemes on the land in our care. We will implement our SMNR toolkit and develop a best practice land-use agreement with Trydan Gwyrdd Cymru to demonstrate how renewable energy development complements land and nature.
- **Delivery of existing schemes:** We will enable and support the three current forecasted schemes: Clocaenog dau, Denbighshire; Glyn Cothi, Carmarthenshire; and Carreg Wen, Rhondda Cynon Taff.
- **New partnerships:** We will continue to work with other developers and community groups to facilitate third party agreements and renewable energy schemes which meet high environmental standards and deliver against Welsh Government objectives.
- **Case studies as demonstrators:** We will develop and publish case studies to promote collaboration and use these to build confidence in us amongst the renewable energy industry and future opportunities.
- **Performance reporting on current and future schemes:** We will publish statistics (e.g. mega-watt outputs, financial reporting, and woodland creation delivery) on current and future renewable energy achievements on the Welsh Government Woodland Estate for the period 2021-2026. This will demonstrate the value in our facilitation of renewable energy schemes.
- **Project forecasts to 2031:** We will also publish a forecast of target energy projects to 2031 on the WGWE. Each scheme will be evaluated using our Sustainable Management of Natural Resources Toolkit, demonstrating our approach to enabling sustainable management of our natural resources whilst contributing to economic growth and value for Wales.
- **Developer handbook:** We will publish a Developer's Handbook, alongside our action plan, to support developers who wish to collaborate with us. This will set out standards

required, including habitats regulation assessment, and information on our decision making.

- **Financial forecasting tool:** We will develop a forecasting tool for renewable energy income on the Welsh Government Woodland Estate, to support financial viability and prudent management of our resources.
- **Simplified governance:** We will explore how we can simplify and streamline governance procedures, where appropriate, to improve responsiveness and efficiency.

Timber sales and marketing

Context and how we will work

The Welsh Government Woodland Estate (WGWE) is a woodland resource. We manage it to generate environmental, economic, social, and cultural well-being benefits for the people of Wales and beyond, now and for future generations.

The woodland estate helps to tackle climate change by locking up carbon. It also provides valuable habitats for plants and wildlife and offers space for recreation. It provides a good supply of timber, which supports employment and rural livelihoods.

We have developed a [Draft Timber Sales and Marketing Action Plan](#) for delivery of the commitments in this strategy in relation to timber sales and marketing. Our questionnaire seeks your input on this plan as well as our strategy.

Our timber sales and marketing plan is our long-standing commitment of timber supply to the sawmills and wood processing sector in Wales. This is in accordance with the Forestry Act requirements of the UK public forest estate, overseen by the Forestry Commissioners.

We recognise the importance of a constant and consistent volume of timber to the marketplace to secure a long-term sustainable future for the Welsh sawmilling and wood processing sector.

We welcome the Welsh Government's [Timber Industrial Strategy 2025](#). This Draft Sustainable Growth and Value Strategy, along with the associated [Draft Timber Sales and Marketing Action Plan](#) will outline what and how we contribute to each of the targets assigned to us at Natural Resources Wales.

Since 2005 we have offered 85% of the production forecast volume availability of the Welsh Government Woodland Estate (WGWE) to ensure sustainable timber supply and carbon stock management. This also improves our ability to deliver the values of Sustainable Management of Natural Resources.

The GB Forest Research Production Forecast of the timber sector (next report due in 2026) informs the volumes we commit to offer to the marketplace, through our forest resource plans.

We manage the WGWE to the UK Forestry Standards and this is audited annually as set out the UK Woodland Assurance Standard (UKWAS). We retain independent verification from both the Programme for the Endorsement of Forest Certification (PEFC) and the

Forest Stewardship Council (FSC ®) demonstrating a continued improvement to the forest environment for people and nature and providing confidence to the forest industry.

UKFS states: *“Sustainable forest management is the stewardship and use of forests and forest lands in a way and at a rate that maintains their biodiversity, productivity, regeneration capacity and vitality, and their potential to fulfil, now and in the future, relevant ecological, economic and social functions at local, national and global levels, and that does not cause damage to other ecosystems.*

UKWAS states: *“Responsibly managed UK woodlands that are healthier, more abundant, more diverse and which deliver a wide and sustainable range of benefits for society, the economy and the environment.”*

Sustainable forest management aligns with:

- Welsh legislation such as the Environment Act Wales, the Future Generations Act Wales and the Natural Resources Wales Order and Remit 2013 (the legislation relating to the creation of Natural Resources Wales)
- our [Corporate Plan to 2030](#) and [Well-being Statement](#)
- our role as a public body and our organisational values.

Management of the WGWE and the wider forest industry has an opportunity to significantly contribute to the wellbeing of our Welsh society in promoting and contributing to a healthy community, an improving environment and local economy whilst working toward a sustainable net-zero and an up-skilled industry.

We can only achieve this by working in collaboration with the Welsh forest industry and wood processors.

Key commitments for 2027-2031

- **Governance standards** We will continue to manage the WGWE to the UK Forestry Standards (UKFS), audited annually as set out in the UK Woodland Assurance Standard (UKWAS). We will retain independent verification from both the Programme for the Endorsement of Forest Certification (PEFC) and the Forest Stewardship Council (FSC ®). We will apply and evolve our Timber Sales Governance Standard, to secure safe, accessible, fair, open, competitive, and transparent sale of timber.
- **Market volume:** We will increase the volume of harvested timber from the Welsh Government Woodland Estate (WGWE). We will identify where we need more investment on the WGWE to enable industry access for further volumes of timber. This will include an action plan and funding proposals and opportunities.
- **Production and forecasting:** We will ensure that timber production remains an objective in our Forest Resource Plans to continually analyse our growing stock of the Welsh Government Woodland Estate (WGWE). We will continue to provide an accurate timber production forecast to inform future availability and secure investment and growth in the timber processing industry.
- **Market value commitment:** We will commit to a timber volume to be brought to market, aligned to the GB Production Forecast 2026-2031, providing commitment to the wood processing sector whilst ensuring we enhance the environment for the people of Wales and nature.

- **Sales and marketing:** We will continue with the standing timber sale offer as the preferred contract model for the delivery of harvesting programmes, with some direct production harvesting where greater control is necessary. We will market open tender eSale events during the period of this plan and explore alternative methods of timber sale.
- **Resilience:** We will develop flexible risk plans for significant events, such as in plant health, windblow, and markets, and to involve collaboration with contractors and processors. We will publish a Restocking for Resilience Statement for the marketplace, working with Forest Research on trials of wider productive conifer species.
- **Safety:** We will work in partnership with the forest sector to continually drive and improve standards of safety, health, health, and well-being.
- **Partnership working:** we will work collaboratively with our staff, partners, stakeholders, industry customers, and communities to pool our collective insight, knowledge and expertise, build trust, and work together on shared goals.
- **Performance reporting:** We will publish timely reports, updates and achievements from this Timber and Marketing Plan to maintain market confidence in supply.

Conclusion

Our draft Growth and Value Strategy sets out how we plan to grow our income, increase the value we deliver, and improve efficiency, while staying true to our environmental purpose.

We have described our current direction of travel – and now we want to hear from you. We are asking our staff, partners, stakeholders' customers, and the communities we serve:

- Does this direction feel right?
- Are there opportunities we have missed?
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We welcome calls and correspondence in Welsh or English.

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