

Draft Timber Sales and Marketing Plan 2027 to 2031

Introduction

We are custodians of more than 120,000 hectares, 7%, of Wales's land, including the Welsh Government Woodland Estate (WGWE), flood defences, and National Nature Reserves.

The WGWE is a woodland resource across Wales. 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.

Our core purpose is to pursue the Sustainable Management of Natural Resources (SMNR), and to apply the principles as set out in the [Environment \(Wales\) Act 2016](#), as custodians of the WGWE.

The woodlands we manage on behalf of Welsh Ministers proudly carry the Forest Stewardship Council (FSC®) stamp of approval, as well as the Programme for the Endorsement of Forest Certification (PEFC) standard.

Being independently certified demonstrates these resources are sustainably managed in a way that maintains biodiversity and natural ecological processes, as well as being socially and economically beneficial. This can give the timber market the confidence that our timber supply is sustainable and helps give buyers confidence about our timber products.

Our draft Timber Sales and Marketing Plan 2027 to 2031

This plan is a supporting document to our [draft Sustainable Growth and Value Strategy 2027-2031](#) which aims to effectively plan, deliver, grow, and measure the income, value, and efficiency of commercial activities within Natural Resources Wales.

The draft strategy sets out our thinking, direction, and high-level commitments in the areas of business development, commercial and recreation, renewable energy, and timber sales

and marketing. This draft Timber Sales and Marketing Plan outlines how we aim to achieve our objectives.

It also outlines the timber marketing contribution to The [Purpose and Role of the Welsh Government Woodland Estate](#) as set out in the document, specifically the fourth principle. This specifies that the productive use of the WGWE will be maintained within sustainable limits and contribute to prosperity.

NRW shall endeavour to achieve a reasonable balance between...the production and supply of timber ,... and the conservation and enhancement of natural beauty and the conservation of flora, fauna and geological or physiographical features of special interest (Forestry Act 1967).

[The Welsh Government's Timber Industrial Strategy 2025 – Making Wood Work for Wales](#) identifies the benefits of a strong timber economy and the requirement to increase the supply of Welsh grown timber to meet future demand. It considers the future role of the WGWE in contributing to timber production and maximising the volumes of timber that can come to market. We need to balance this carefully to ensure harvesting meets our needs in managing the estate to deliver against our Climate, Nature and Sustainability goals in a safe and proportionate way.

Our draft Timber Sales and Marketing Plan (TSMP) describes our commitment to balance our objectives alongside timber supply from the WGWE for the 5-year period 2027 to 2031. The aim is to enable new businesses, timber customers, harvesting suppliers, and the processing industry to plan, grow and invest. This is an evidence-led plan, drawing upon data from the latest production forecast as an indication of potential volumes available for harvest.

Our portfolio of Forest Resource Plans (FRPs), as approved by the regulator, demonstrates our commitment to the sustainable management of the natural resources, and outlines the programme of sustainable felling on WGWE.

Our TSMP applies three main principles to our Timber Sale activities:

- Principle I – **Ensure** safe, accessible, open, fair, competitive, and transparent sale of timber, through strong governance.
- Principle II – **Provision** of timber to enable value-added growth potential to the wood industry, seeking opportunities to increase harvestable timber volume.
- Principle III – **Enable** the Sustainable Management of Natural Resources on the Welsh Government Woodland Estate through timber sales activity.

We want to consider your views as we develop our Timber Sales and Marketing Action Plan. You will find prompts for questions under each of our themes below.

The best way to share your feedback with us is [online](#). You can also submit your views by emailing timber.sales@cyfoethnaturiolcymru.gov.uk or calling [0300 065 3000](tel:03000653000) (Mon-Fri, 9am-5pm).

The deadline for feedback is Sunday 08 March 2026.

Governance and standards

Our management of the WGWE is externally audited each year to UK Forestry and international standards of forest certification, as set out in the UK Woodland Assurance Standard (UKWAS).

Certification is independent verification of our sustainable management of the WGWE, reaching Forest Stewardship Council® (FSC®) and Programme for the Endorsement of Forest Certification (PEFC) international standards. This ensures we can certify our forest products and provide confidence to customers.

Our Forest Stewardship Council® FSC® licence code is FSC-C115912 and PEFC licence PEFC/16-40-1003.

The Timber Sales Governance Standards (TSGS), along with the associated guidance and instructions, sets out a framework to ensure the safe, accessible, fair, open, competitive, and transparent sale of timber from the Welsh Government Woodland Estate. We will continue to evolve our TSGS to best secure income to manage the WGWE and properly administrate a public asset.

Actions:

ACTION 1: Maintain FSC® and PEFC certification through independent verification.

ACTION 2: Apply and evolve our Timber Sales Governance Standard to secure safe, accessible, fair, open, competitive, and transparent sale of timber.

Questions:

How important is the independent forest certification of WGWE for provisioning the wood industry and maintaining market confidence?

How effective are current NRW governance measures in ensuring fair, open, competitive, and transparent timber sales?

Our market volume, production, and forecasting commitment

Our production forecast gives an indication of the volume of timber growing stock available for harvesting during a 25 year or 50-year period. The production forecast is a theoretical maximum amount of timber that would be produced if we were to do all the felling (and thinning) in each of our Forest Resource Plans, on time, and to the predicted volume. Therefore, the production forecast is not static, and changes as our forest resource plans are renewed.

Publication of the GB Forest Research production forecast of the public and private forest sector is published every five years and gives an indication to investors of the potential available volume from the woodlands of Wales.

This approach ensures we secure a sustainable supply of timber and carbon stocks beyond this plan and improve our ability to deliver more Sustainable Management of Natural Resources values across the WGWE.

The next updated production forecast report, due in early 2026, has not been published yet, so we are unable to commit to a sustainable volume harvest figure. However, in year one of this plan, we have already committed that the annual sale offer for next year (826,000m³) is more than the average for the previous 5-year period.

We will publish the range available for harvest for the remainder of the period as soon as the production forecast is available. This will be influenced by market uptake to enable us to continue to balance our objective of sustainable forest management.

We will ensure that timber production remains a management objective of our forest resource plans, balanced with the need for the sustainable management of the WGWE.

We will identify investment opportunities to enable access to more timber from the WGWE. This will include an action plan and proposals for funding required.

Actions:

ACTION 3: Increase the volume of harvested timber from WGWE.

ACTION 4: Ensure that timber production remains a significant objective of the WGWE, through our cycle of FRP renewal.

ACTION 5: Continue to provide an accurate timber production forecast to inform future availability and secure investment and growth in the timber processing industry.

ACTION 6: Develop an action plan and funding opportunities to access further volume from the WGWE.

Question:

Is the proposed sustainable harvest volume (based on the production forecast) aligned with market requirements?

Our sales and marketing approach

Timber contracts are a mutual commitment to harvest, in good faith and agreed timeframes, between Natural Resources Wales and our customers.

Timber will continue to come to market through two widely practiced and established contract methods - Standing Sale and Roadside Sale.

- Standing sale means the landowner sells the trees still in the forest. The contracted timber is sold as an estimated weight, and the customer assumes the responsibility for the felling, extraction, and haulage of timber. This method allows the customer to

convert standing timber into timber products best suited to the intended markets or processing requirements

- Roadside sale involves the landowner assuming the responsibility for timber harvesting through a service contract provider, and presenting timber at roadside. This gives an estimated weight of given products, to a pre-determined specification, available from a contract site. The customer has responsibility for the safe collection and haulage of products from the forest

Most of the timber will continue to be offered as a sale by despatched weight as this method currently offers the best balance of efficiency of harvesting and security of the public asset.

It is proposed that between 90% to 95% of the annual programmed timber volume will be sold via standing sales. This means customers are better able to respond to market requirements, add value, and support growth of the contractor resource.

We will continue to support direct production timber harvesting provision in places where we consider greater direct control is necessary for our risk management and security of programme. This also helps to maintain skills and assurance of timber market values. All produce recovered from direct harvesting production will be offered through Roadside Sale.

This plan will continue with the principle of coupe-based contracts. This means the size and scale of contract parcels will be determined by the defined coupes (defined harvesting areas) within an approved Forest Resource Plan. On occasion, consideration will be given to bringing multiple coupes into one contract, where this delivers the best outcome for the forest resource, or a better commercial outcome.

A full pre-sale valuation process will be applied to timber contracts to ensure best value. This valuation process will assume the principle of maximum product recovery. A hierarchy of timber products (preference to recover timber products that can deliver a higher value specification and longer design life) is used to determine the best outcome for an individual lot. Therefore, the offer of timber to the market does not guarantee all timber will be sold.

Actions:

ACTION 7: Continue with the standing sale as the preferred contract model for the delivery of harvesting programmes, with some direct production harvesting where greater control is necessary.

ACTION 8: Ensure the timber product hierarchy is considered and applied during valuation, lotting and marketing of sale parcels.

Question:

Do you agree that a standing timber sales contract model on WGWE offers the best opportunity for sustainable harvesting, market resilience, product recovery, and net benefit?

Sales mechanisms

In previous years, we have focused on delivery of four main eSale events, occasionally supported by interim eSales to respond to environmental events or unforeseen programme changes.

During this plan for 2027-2031, we propose to increase to five planned eSale events a year. This will provide more certainty and a better opportunity for customer bidding and agility of harvesting programmes.

The published eSale timetable will form the basis of the annual sale offer, supported by occasional smaller interim eSale opportunities, if required.

The eSale timetable will be published in February each year for the following financial year and will show the closing dates of each sale. Each individual eSale will include a seven-week viewing period to allow bidders to visit the site to ensure products included within coupes (defined areas) meet their requirements.

During the plan, we will pilot an online, live bid auction format, as an interim sale, to offer additional purchase opportunities outside of the five main sale events.

Open market sale by tender will presume an award to the highest bid, achieving reserve, from a qualifying customer with good performance history. The sale panel maintains the ability to recommend award to an underbidder in the circumstance of a higher bidding customer posing a competence, capacity, and/or financial risk. In rare circumstances, we reserve the right for a negotiated, direct award of a timber parcel. This is usually where there is an urgent requirement to fell trees on the estate, or where a parcel of timber has failed to sell at open market.

Contractual arrangements currently follow the principle of 'sale by weight,' offering the best method to deliver convenience and security. We recognise the potential benefits of a 'sale by volume' contract model to the workforce, by encouraging quicker uplift and enabling faster invoicing. We will explore invoicing and payment mechanisms based on data from harvesting and haulage equipment.

We are also keen to test the use of integrated harvesting contract models. By allowing customers to build their own harvesting facilities, there is an opportunity to enable safety improvements, and allow us to invest our engineering resources elsewhere.

Actions:

ACTION 9: Market five open tender eSale events per year during the period of this plan, and trial a live e-auction format sale.

ACTION 10: NRW will continue to explore alternative methods of timber sale and will trial Progressive Sale contracts, Sale by Volume, and integrated contracts.

Questions:

Should timber sales primarily be conducted via open tender?

What is the optimal number of open eSales per year to balance supply and demand?

Would you support the introduction of a live auction format sale, to complement routine, programmed open tender sales?

How important is contract innovation to the sector (e.g. directed sale, designated supply contracts, customer delivery of harvesting facilities, volumetric sale)?

Our resilience

The impact of climate change is increasing the frequency and severity of threats to our forests through wind, drought, and wildfire events, as well as threats of endemic and epidemic pest and disease. These significant events are a risk to annual harvesting programmes, and stability of markets.

We will seek to ensure that our timber production and marketing response to events such as these are proportionate and considered, aiming to maintain planned volume and continuity of supply and avoid over supply. Any reactionary or precautionary felling will be delivered primarily through open market tender exercise within the planned sale events.

For emergency response, or where felling is urgent to secure the WGWE, we will apply variations to existing contractual arrangements or use direct award mechanisms to manage and reduce the risk to the estate.

Where response requires the removal of timber volume exceeding the planned annual WGWE harvest (currently between 735,000m³ and 835,000m³), we will bring together a group of industry representatives. They will consider a strategic approach to the harvesting and marketing of the timber to maximise product recovery and prevent any potential distortion to markets.

Actions:

ACTION 11: We will develop flexible risk plans for significant events, through collaboration with purchasers, contractors, and processors.

ACTION 12: We will publish a Restocking for Resilience Statement for the marketplace, working with Forest Research on trials of wider productive conifer species.

Questions:

How effective are current marketing strategies in responding to market changes?

How confident are you in our ability to respond quickly to climatic events and plant health challenges?

Safety

Partnership working with the forest sector offers the best opportunity to identify and share incident trends and improve standards of operational safety in our harvesting and haulage activities.

We will support the wider forest industry via initiatives, including an “upskill to uplift” development programme, local timber transport groups, and safety, health, and development days (SHAD’s).

We will continue our support of FISA (Forest Industry Safety Accord), through collaboration and representation on working groups, contribution to guidance and promotion of safety campaigns.

Through a customer qualification process, we will continue to ensure all customers who trade and operate on the WGWE demonstrate competence and assurance of their contribution to a safe working environment, good environmental standards, contractual delivery, and transactional compliance.

Actions:

ACTION 13: Work in partnership with the forest sector to drive and improve standards of safety, health, and well-being.

Questions:

How would you rate current safety practices in harvesting operations on WGWE?

How clear and fair are current customer qualification criteria in ensuring a minimum standard of safety, compliance and to enable competitive bidding (Timber Sale Qualification and Health and Safety Questionnaire)?

Partnership working

We will continue to actively engage with the forest and wood processing sector to ensure clear communication of programmes through meaningful collaboration with Welsh Government, customers, partners, industry groups, and communities.

The programme of Forest Resource Plan reviews is a further opportunity for timber stakeholders to actively input into the sustainable management of the WGWE.

Our customer engagement events will launch with our customer day in February of each year. At these events we will share the annual statement of timber supply from the WGWE and a timetable of planned sale events for the forthcoming 12 months. The day will include an opportunity for discussion on future developments.

We are ready to provide the processing industry with certified timber and respond to an increased demand for Welsh wood. We will work directly with the Tai ar y Cyd landlords to ensure availability of home-grown timber for sustainable homes. We will engage with

processors, construction, and developers to develop sustainable and scalable supply chains from within the 5-year timber harvest from the WGWE.

We will support the timber haulage sector through national and local transport initiatives, to secure safe and sustainable haulage and manage the impact of timber haulage on communities.

We will build intelligence on the timber requirements of the small, micro, and niche sawmillers and processors in Wales. This aims to better support this community with the provision of timber either directly or through existing supply chains. We will support access to timber parcels through the qualification of individual customers or co-operatives within the small/micro/niche sawmilling community. We will identify and secure smaller, individual parcels of appropriate specifications from within the annual harvesting programme, for roadside sale.

Actions:

ACTION 14: Continue with active engagement, sharing, and collaborations with customers and stakeholders through our programme of customer engagement.

Questions:

What further engagement with the sector could we do to ensure our timber sale activities deliver the best outcomes?

How better can we support sector development for small/micro/niche sawmillers?

Performance reporting

We will continue to monitor the forward-sold position of timber sales in contract. Where such volumes exceed the total annual year supply from WGWE, we may consider varying the sale programme through a reduced offer of volume in future sales. Our volume of sold timber still to harvest (forward sold position) will be monitored and published quarterly.

As well as reporting annual volume targets on a national level, performance of the delivery of the timber sale programme will also be measured as an annual key performance indicator (annual volume) for each of the seven regional places.

We will continue to report against timber sale performance for timber sales and harvesting activities on the WGWE on an annual, quinquennial, and interim basis, this will include:

- Forest Research annual timber statistics for GB
- end-of-year volume sale offer to market figures for roadside and standing timber sales, on a national and regional basis
- safety and environmental standards and performance of timber harvesting on the WGWE
- achievement of targets for replanting
- achievement of published sale events
- forward sold volume commitment
- our end-of-year timber income and despatched volume figures

- publication of upcoming planned annual sales volume targets, in good time to enable the sector to plan
- presentation of customer risk statistics (anonymised)
- publication of the financial accounts for forestry managed on the WGWE via the annual NRW annual report and accounts.

Actions:

ACTION 15: Commitment for swift and accurate reporting of data to maintain market confidence in supply.

Questions:

What factors would help create greater confidence in timber supply from the Welsh Government Woodland Estate?

Are volume-driven KPI targets appropriate at a regional (place) level?

Strategic alignment

The strategic direction of our timber sales and marketing at NRW, as well as other commercial activities is set out in the [draft Growth and Value Strategy](#) referred to in the introduction of this document. Additionally, our timber marketing contributes to the [Welsh Government's Timber Industrial Strategy 2025 – Making Wood Work for Wales.](#)

Question:

How well does the Timber Sales and Marketing Plan proposal 2027-2031 align with our strategic objectives, as well as delivering against the actions in the Welsh Government's Timber Industrial Strategy 2025?

Conclusion

We are pleased to have shared our draft Timber Sales and Marketing Action Plan 2027 to 2031 with you our staff, partners, stakeholders, customers, and members of our communities.

We want to consider your views and ideas before we publish our final plan. The best way to share your feedback with us is [online](#). You can also submit your views by emailing timber.sales@cyfoethnaturiolcymru.gov.uk or calling [0300 065 3000](tel:03000653000) (Mon-Fri, 9am-5pm).

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