

NZIER REPORT ON FORESTRY - STRONG ECONOMIC AND ENVIRONMENT CONTRIBUTIONS

THE NZIER REPORT INTO PLANTATION FOREST STATISTICS PUTS OUR FOREST SECTOR AHEAD OF BEEF OR SHEEPMEAT EXPORT VALUES, BUT SUGGESTS THE BIGGEST VALUE OF OUR INDUSTRY TO NEW ZEALAND LIES IN ITS ECOLOGICAL BENEFITS.

The picture painted by the New Zealand Institute of Economic Research Report of the New Zealand forest industry is like an iceberg.

Above the surface, the economic returns from forestry place it as an increasingly vital primary industry for New Zealand.

Below the surface, there is evidence of tangible but insufficiently quantified environmental benefits. These may come to

outweigh the narrower economic factors.

Forestry is a significant land-based industry. It ranks obviously behind the erratic returns of dairying. But then, so does everything else in this country.

New Zealand forest product export receipts will outstrip the more glamorous horticulture export returns for some years to come. By 2020 the forecast for forest export earnings is \$6.15 billion.

Total meat and by-products and wool export returns are still ahead of total forest product export income. But, now, for the first time since 1882, the value of forest product exports from New Zealand is exceeding the value of meat exports.

Regionally, forestry and logging can be even more economically vital. For Gisborne - Tairāwhiti the forest industry represents nearly 5.5 per cent of GDP and is growing rapidly, likely to make it the province's most important primary industry.

But it is in the 'below the waterline'

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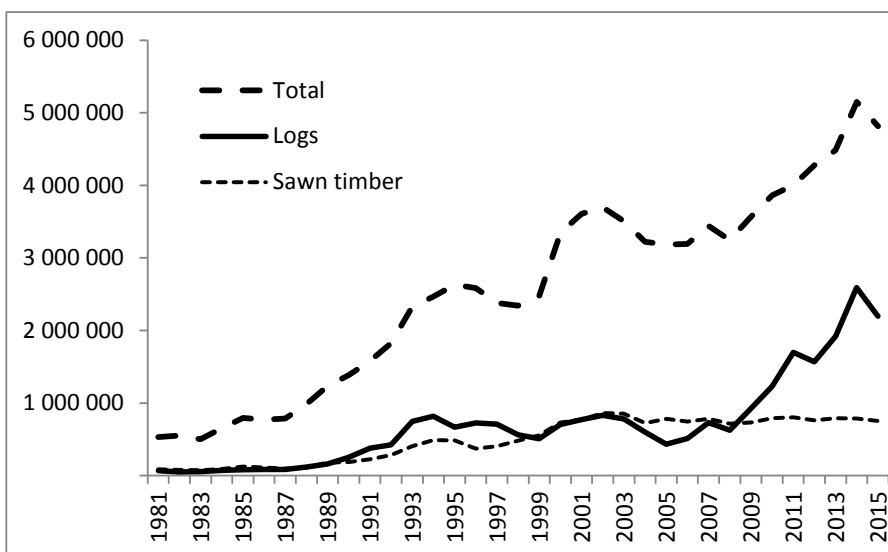
environmental area that NZIER has the most far reaching recommendation for the way the forest industry is perceived.

NZIER suggests that a satellite account for forestry be established so that the beneficial effects of forestry on the environment can be brought into a national accounting system. This would more properly reflect the industry's importance and ensure a balanced understanding of industry value. Such a satellite account already exists for tourism.

For instance, the NZIER Report cites a conservative value of \$300 million a year from the value of capture of carbon from the atmosphere. It identifies \$420 million from the contribution plantation forests make to taking contaminants out of water courses.

Reduced soil erosion is estimated at \$208 million per year nationally. But that could be extremely conservative. For instance, farmland on the Manawatu Plains was seriously flooded in 2004 and then again in 2015, with huge costs in lost dairy and crop production and then land restoration. But no in-depth study has been done on how less serious the floods might have been if the back-country hills had a forest rather than a pasture cover.

These conservation values are extremely difficult to quantify in monetary terms. It is obvious, to most people at least, that trees, either as riparian planting or more



Exports of selected forestry products - Value, NZ\$ 000s
Source: Ministry for Primary Industries and Statistics New Zealand cited by NZIER

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BACK COUNTRY FARM REASONS TO LOOK TO FORESTRY

BACK-COUNTRY FARMING HAS PREVIOUSLY BEEN IMMUNE FROM NUTRIENT DISCHARGE CRITICISM. BUT RECENT GOVERNMENT GOALS ON WATER QUALITY ARE CREEPING UPSTREAM.

Environment Minister Nick Smith waded into a torrent of criticism when he announced a long term national clean-water policy.

The communication of the change, with crucial reference tables only belatedly being made available, didn't help. But equally, a headline that says you have a one in 20 chance of getting sick if you go swimming is also unhelpful. The attempt to move away from 'wadeable', which means little to the average kiwi, to 'swimmable' and to establish a nationally consistent framework has to be applauded. That said, it also illustrates that we have a lot to do on our waterways.

Most of the policy was aimed at dairy farm effects, but goals were set for drystock stock exclusions as well, with major long term implications for land use.

A large part of the North Island is sheep and beef hill country, and so too steep and infertile for dairy farming.

But it is an industry in trouble. MPI predicts sheep and beef revenue to fall again this year for the third year in a row. Sheep and beef cattle numbers are falling and markets difficult. Drystock export revenue to this June is expected by MPI to fall \$791 million from two years ago. Forest product exports will rise \$648 million in the same period.

Beef farmers on flat to rolling country could now be given an additional reason to review their long-term land use viability. Free-range beef animals run on slopes of up to 15 degrees are slated for waterway exclusion by 2030. Dairy support and break-fed cattle need to be fenced off earlier, by 2022.

Not only will farmers have to build fences, but often also reticulate drinking water through those fences. Values of such farms would likely fall as deadlines for compulsory fencing prospects come closer.

Plantation forests would be an attractive option in this context. They do not need to be fenced from waterways. Economic returns for trees are more positive than dismal meat and wool futures.

Sure, all this is speculative as to how farmers will perceive the future and their options in it. New Zealander's opinions on water quality policy have recently been measured as showing it as the public's number one environmental concern. The issue will not go away.

On top of that, the government has just received advice, via an independent report, that if we do not change land use then we will not meet our long term greenhouse gas emissions reductions goals (see Vivid report page 3)

As with the issue of climate change, forestry is also well placed as a conservation tool to enhance water quality.

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extensively, have a raft of environmental advantages over unmixed pastoral agriculture. But a consistent framework needs to be developed to properly understand and quantify the economic value of forests to New Zealanders.

If the research and sums are done, then the long-term value of our plantation forests may turn out to be much more valuable that we already know them to be.

The Plantation forestry statistics Report covers other important aspects of the forest industry, from portable sawmills to recreation and tourism. It addresses forestry labour force requirements for instance, again with the concern that little information is available.

Copies of the Report are available on-line at the FOA website or hard copies by request to FOA.



NZIER Report lead author Chris Nixon and Rotorua Lakes District Council Mayor, Steve Chadwick

The NZIER Report was launched at the Rotorua Lakes District Council on the International Day of Forests, 21 March. Mayor Chadwick told attendees that Rotorua Lakes Council was the first local body in New Zealand to adopt a Wood First policy in building construction, and she is very confident other councils around New Zealand will follow suit. Chris Nixon commented the New Zealand's forest industry is "not just something which goes across the border but which contributes to our environmental progress."



FEWER COWS AND MORE TREES IN NEW ZEALAND

VIVID ECONOMICS AND OECD REPORTS ARE CRITICAL OF CONTINUED GROWTH OF THE NEW ZEALAND DAIRY INDUSTRY ON ENVIRONMENTAL GROUNDS AND VIVID PUSHES FOR PLANTATION FOREST OFFSETS.

Two reports within the space of one week this March, on the state of the New Zealand environment due to dairy farm expansion, with one specifically pointing the way to a massive expansion of the New Zealand forest estate to fix carbon from the atmosphere.

The London based Vivid Economics report, Net zero in New Zealand - Scenarios to achieve domestic emissions neutrality in the second half of the century' was commissioned by a cross party group of 35 Members of the New Zealand Parliament. The report presented three scenarios for greenhouse gas mitigation, encompassing

changes in industry, transport and the primary industries.

All scenarios envisage large increases in the plantation forest estate, which is currently at 1.7 million hectares.

The first Vivid scenario relies on existing technology to reduce New Zealand's greenhouse gas footprint, retaining livestock numbers as they are and an expansion of 0.5 million hectares of plantation forests. Vivid believes this will not be enough for desired carbon neutrality by 2100.

The second and more ambitious scenario, replaces between 20 and 25 per cent of livestock with crops and horticulture, but also expands the plantation forest area by 1 million hectares.

The third scenario relies even more heavily on forestry, projecting an almost doubling of the current estate, by adding 1.6 million hectares to New Zealand's plantation forests.

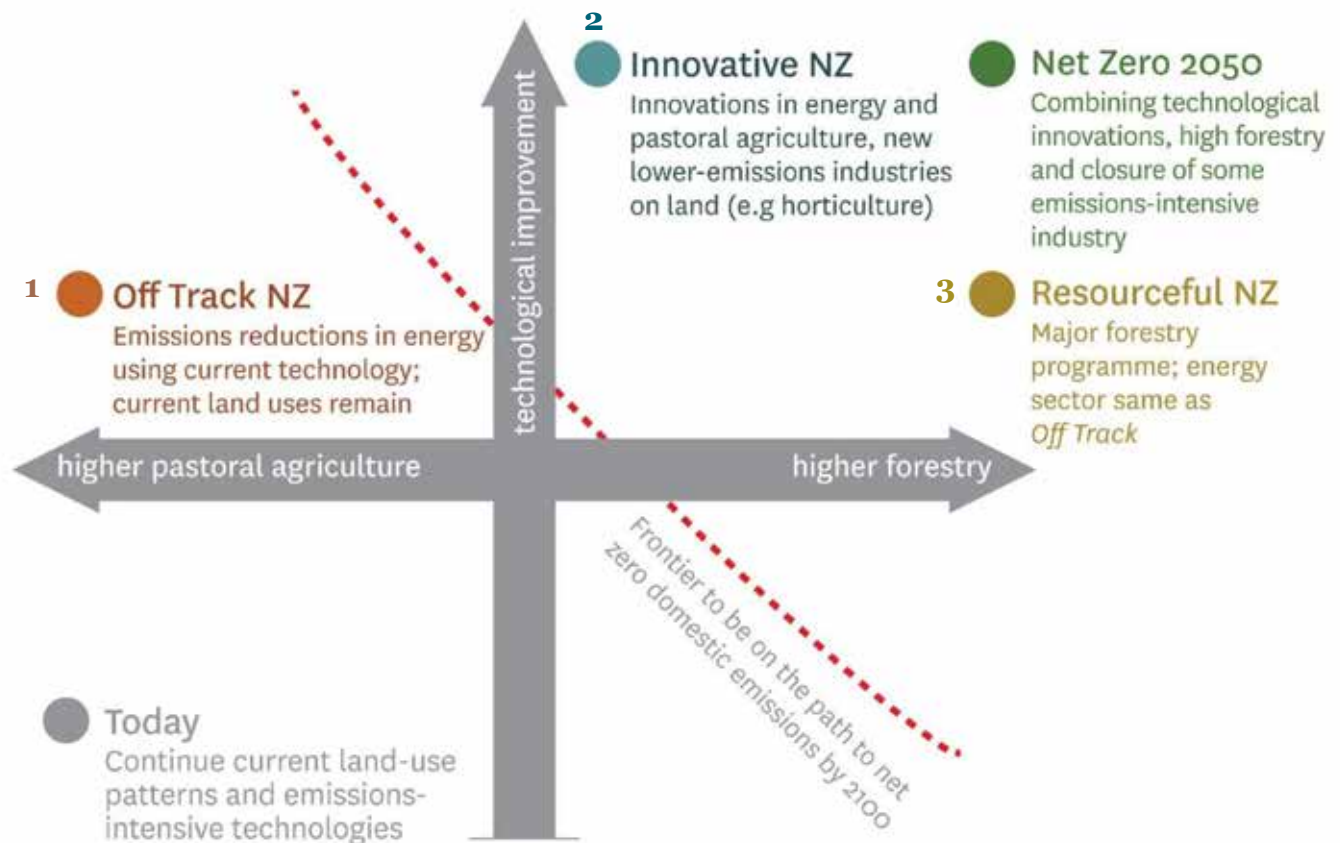
The Vivid Report is in line with a number of previous analyses, most recently the October 2016 Report from the

Parliamentary Commissioner for the Environment, which effectively question the continued absence of agriculture from the Emissions Trading Scheme and see expanded forestry as the only available and immediate means of New Zealand meeting its Paris Agreement obligations to reduce our greenhouse gas emission rate.

The other report; OECD's Environmental Performance Review of New Zealand 2017, states New Zealand is wrong to rely on increasing agriculture production to boost exports, the ETS is not making any meaningful contribution to reducing our greenhouse gas emissions and New Zealand's past few years increase in freshwater nitrogen is the worst rate in the OECD.

The report however noted the environmental percentage of New Zealand's overall research is, at 10 percent, the highest in the OECD.

The government responded to the OECD report by stating that it highlights New Zealand's green credentials and strong progress New Zealand has made over the past decade.



Scenarios differ by the level of technological progress and land-use patterns
Source: Vivid Economics

JUNGLE BOOK MEETS A BUGS LIFE

PRACTICALITIES OF GOVERNMENT AND INDUSTRY COORDINATION ON THE GROUND ARE NECESSARY TO EFFECTIVELY IMPLEMENT THE GOVERNMENT INDUSTRY AGREEMENT ON BIOSECURITY.

FOA and MPI have been examining how effective their combined resources might be if a major pest or pathogen arrived in New Zealand and attacked our forests.

Delegates to a forum in Rotorua in early March participated in scenario workshops on the arrival of two of the most feared forest invaders, Pine Pitch Canker and Nun Moth.

The workshops provided everyone with an invaluable learning experience in clarifying response roles and responsibilities by using role play to understand gaps and issues in the processes.

The Principal Research Scientist with the New South Wales Department of Primary Industry’s Forest Science team, Dr Angus Carnegie delivered some warnings from the Australian experience.

He showed a record of incursions into Australia for more than 100 years, with an accumulating economic impact on the Australian industry. The rate of interceptions is escalating. Most of the interceptions are at sea ports with the increasing volume of timber product imports.

Angus Carnegie also provided an analysis of the considerable benefits of spending on

control of Eucalyptus leaf beetle which had invaded Tasmania from the Australian mainland. Last year this same beetle re-appeared in the Wellington region after a previous attempt at eradication.

The Rotorua event was part of a process of engagement between the forest industry and MPI begun when FOA became the sixth primary industry organisation to sign a Government Industry Agreement with MPI in late 2015 on management of pests and diseases.

Under GIA, signatories share the decision-making, responsibilities and costs of preparing for and responding to biosecurity incursions. MPI has 14 industry sector partners with two others about to come on-board.

FOA Executive Council member and chair of the Forest Biosecurity Committee, David Cormack says New Zealand’s commercial plantation forest industry is comparable in importance to the meat industry, with growing export values likely to be worth \$5.3 billion this year.

“It is a major regional employer with approximately 26,000 people in forest growing and harvesting, and wood processing and manufacturing. Our trees,

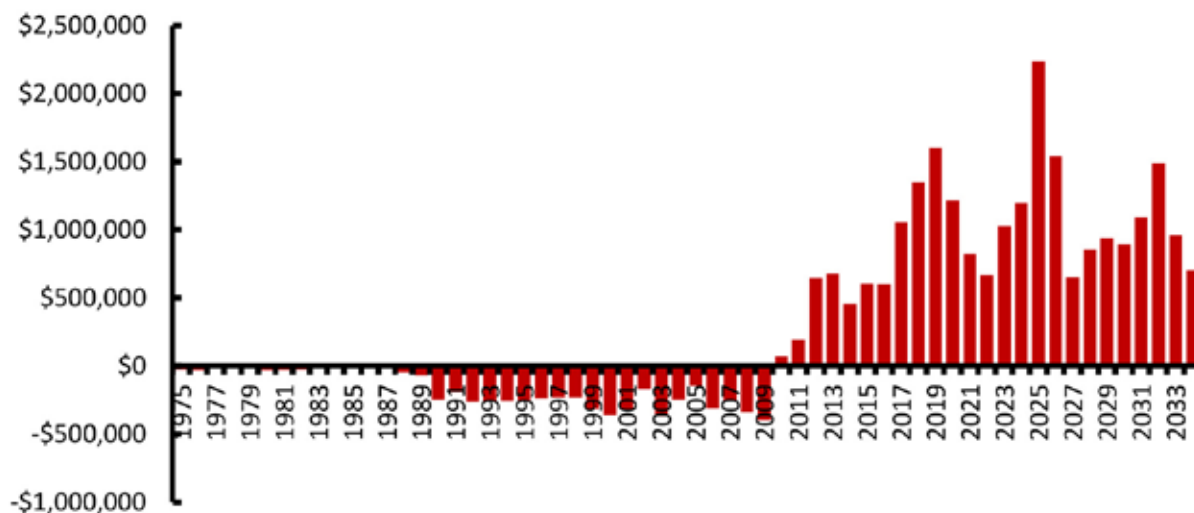
however, are highly vulnerable and the arrival of a significant pest or pathogen could devastate the industry. This was one of the biggest motivators for us to join the GIA partnership.”

MPI’s Team Manager Incident Management, John Brightwell, says the workshops were an opportunity to develop readiness and response capability for current and future incursions.

“GIA is set to become a driving force in the way New Zealand responds to biosecurity risks. GIA partners help us strengthen our biosecurity system for the good of all New Zealanders.”

FOA’s Biosecurity Manager, Bill Dyck adds that the GIA presents a number of opportunities for industry, including early notification of biosecurity incursions and joint decision-making at response governance level.

“Getting together was also an opportunity for industry partners to receive training for response governance and management of any incident. We set ourselves a range of actions over the next year to address issues, which will make the GIA partnership stronger, more transparent, and more effective.”



Net cash-flow of costs and benefits of the Eucalypt leaf beetle programme in Tasmania (A\$ 2015)
Source: T Wardlaw and N Cameron

FIGHTING FIRES WITH SCIENCE?

IF WE ARE TO HAVE MORE FREQUENT AND EXTREME RURAL FIRES, THEN SCION IS MEETING THE CHALLENGE TO PROVIDE THE ADVANCED SCIENCE, TECHNOLOGY AND MANAGEMENT TO FIGHT THEM.

Nature has thrown New Zealand a few curve balls lately. Hot on the heels of the Kaikōura earthquake, fires have raged this past summer in Coromandel, Hawkes Bay and Canterbury. They have destroyed homes, farms and forests, as well as damaging vital infrastructure.

Rural wildfires are common in New Zealand. On average, 3000 fires are reported every year and around 6000 ha of land is burnt.

Firefighters anticipate how these fires will develop using tools for New Zealand conditions developed and adapted by Scion's rural fire research group.

One such tool is called Prometheus. It was used against the Port Hills fire to predict how the fire would behave, including breakout scenarios, how fast it would spread, how hot it would get and how far the flames might reach.

From this, the incident management team developed the fire attack strategies, determined what resources they needed, and how to ensure fire-fighter and public safety, including timing of lifting evacuation cordons.

Scion fire scientist Grant Pearce observed the recent Port Hills fire personally. He says it met the definition of an extreme fire. It escalated suddenly, spread rapidly



Fire Scientist Grant Pearce (right) and some of the damage done by the Port Hills fire, March 2017.

and with high intensity, changed directions abruptly, with fire whirls and a fire tornado.”

Extreme fires are likely to be more frequent in New Zealand. Climate change is predicted to bring higher temperatures, decreased rainfall in some areas, and stronger, more frequent, westerly winds. More people moving to live in rural areas is also likely to increase the risk of destructive fires.

The Scion rural fire research group has the background experience to meet these threats. Just this month the group and rural fire end-users celebrated 25 years of rural fire research in New Zealand.

Grant Pearce says over these years Scion research has been a mix of reducing fire risk, getting ready to respond and fight fires and how to recover from them.

“Now we are preparing for a future with more extreme fires. We can't stop Mother Nature, but we can take precautions and be prepared, based on the best science which becomes available. To this end, we began a five-year project to understand and address the threat of extreme fire a few months ago.”

The work is supported by the Ministry of Business, Innovation and Employment's Endeavour Fund, a number of stakeholders, and Scion's core funding. Local and international fire experts got together in Christchurch in late February,

coincidentally a week after the Port Hills fire, to plan the new research programme.

One of the five research themes is to improve fire prediction tools by gathering information on when extreme fires are likely to occur, what atmospheric conditions cause a fire to escalate, and the affects of heat transfer mechanisms in different fuel types.

The researchers hypothesis is that atmospheric turbulence and convective heat transfer from the flame front to unburned fuels. This is now playing a more important role in fire spread.

The Scion team plans experimental burns to look at what is happening on a small scale within the flame front itself, as well as on the larger scale in the atmosphere above the fire or potential fire.

The researchers plan to use drones, wind sensors, and high-speed and infrared cameras, to record how fire spreads from one fuel source within the fire to another.

The rural fire research group is also working with the Resilience to Nature's Challenges, National Science Challenge to strengthen how a community copes with wildfires and other natural hazards, improve firefighters' ability to cope with stress and keep them out of harm's way with more remote firefighting, and increase the use of drones to monitor fires and hotspots.



Fire scientist Veronica Clifford setting up a GoPro camera to monitor a controlled wilding burn, Aoraki, March 2016

FOREST SAFETY LEARNING : AWAY FROM THE BLAME

INDUSTRY'S AIM TO BRING ALL THE GUYS 'N GIRLS HOME SAFELY IS ONE STEP CLOSER.

Tests of a new blame-free incident investigation model are promising for rapid forestry safety culture change in New Zealand.

“The overall objective is to learn from the incidents that have plagued the industry in past years causing fatalities and injuries, according to Forest Industry Safety Council national safety director Fiona Ewing.

“There is certainly an appetite for change from all in the industry,” she believes. “We want to move away from blame and punishment to learn more from the incidents. It is important to find out HOW something happened rather than WHAT happened.”

In 2015, FISC commissioned Scion human factors scientist Brionny Hooper to lead the Learning Review research work, which is supported by WorkSafe. This young researcher – winner of the inaugural Young Forest Scientist of the Year last year – is well versed in working with tough crews having had forays into other high risk industries, such as fire, mining, aviation and healthcare.

She found use of a model by the United States Forest Fire Service over the past decade, alongside regulatory bodies and industry organisations, meant that a US industry first was achieved in the 2015 Twisp River fire where three firefighters died.

“No blame has been placed under the use of the Learning Review process. In fact, no law-suits have been filed and the US Worksafe-equivalent did not prosecute or issue a violation for the first time in history after a wildfire fatality.

“It’s a completely blame-free system that has made such a change in such a litigious society, with more than 30,000 workers in the wildland fire service,” she says.

Brionny Hooper has adapted the US model specifically for New Zealand conditions. Because the New Zealand forest industry is relatively small and is a high-risk occupation with an openness to safety culture change, she sees the potential for that change to be made rapidly.

“It’s also a unique opportunity for the forestry industry to take a leadership position in testing a process that could be



Brionny Hooper has just been nominated for the International Council of Forest & Paper Association’s global 2017 Blue Sky Young Researchers and Innovation Award. This recognises her positive engagement with New Zealand forestry on the Learning Review and for her approach towards working with the crews which has resulted in a high degree of trust.

applied to any industry.”

The current investigative technique is based on cause finding, she notes. “It’s designed to look for the simplest answer, which means learning cannot take place,” she says.

Phase One of the Learning Review, which had WorkSafe funding, took place last year. The pilot looked at a cable logging incident to test the model developed by Brionny Hooper and took a structured, phased approach putting the incident into the context of the work environment and all the complex influences common to daily work.

“We were basically looking at why it made sense for the incident participants to do what they did.”

Brionny Hooper says the focus group with the crew involved revealed “little golden nuggets of learning” and was a really “eye-opening experience” for her. In the blame-free environment, she found the crew was sharing the tricks they had learned to avoid similar situations.

“The beauty about this process is that the learning comes from operational people rather than being imposed from the top by health and safety.”

Phase Two adds to the Phase One pilot success and is building capability through a series of five incident case-studies being worked on this year. In one of the case studies, Brionny Hooper is working with Nelson Forests’ health and safety manager Les Bak on an under-cables incident last year.

Brionny Hooper recently made a visit to meet Nelson Forests contracting crews. She is working with Nelson Forests Health and Safety Facilitator Les Bak. He says the

first contractor meeting in Rai Valley went very well and provided good learnings and outcomes. He says the crew was engaged by Brionny Hooper’s positive and personable process and her genuine interest in their operations and how the work gets done.

“They all seem to have lots to say and like the opportunity to share their stories and information,” he says, adding the focus on human factors is well aligned with Nelson Forests’ current investigation process.

“But it brings a whole new level of analysis to this approach.”

He believes the new model will benefit Nelson Forests’ approach to learning from incidents because it includes a review group bringing people together from across crews or industry to review the incident.



Les Bak, Health and Safety Facilitator, Nelson Forests: “It brings a whole new level of analysis”

“This will give us great insight into best practices and methods to reduce influencing conditions and pressures leading to incidents. It also involves more people in the crew so they will quickly pick up on the approach and be able to investigate and review their incidents with greater skill and knowledge.”

Is it the ‘next step’ for forest safety? Les Bak notes industry has been asking for a process like this that actually shares incidents in a way that learning is achieved and further incidents prevented.

“What more could you ask for? If we focus on the high potentials and the near misses, all the better. If we can learn from the golden nuggets then we will prevent a lot of injuries – or worse – in industry.”

“Forestry culture will change rapidly.”

Brionny Hooper acknowledges the approach is going against human nature, realising how things happened, acknowledging they happened and ignoring the instinct to blame.

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PRODUCTION

HAS THE TIDE TURNED? – NURSERY SALES INCREASE

POSITIVE INDICATIONS ARE EMERGING THAT THE DECLINE IN NEW ZEALAND'S PLANTATION PLANTED AREA OVER THE PAST DECADE IS REVERSING, ALBEIT THAT MOST OF TODAY'S PLANTINGS WON'T BE HARVESTED UNTIL 2045.

An MPI survey shows plantation forest seedling sales in 2016 were 52.2 million seedlings, a rise of 2.7 million seedlings on 2015. The survey results are from all 28 nurseries in New Zealand producing plantation seedlings.

Drivers of the increase are likely to be higher values for logs, a quite rapid increase in the price of carbon units, and statements by the Minister of Climate Change Paula Bennett that give more certainty about the role that forestry will play in New Zealand's greenhouse gas mitigation efforts.

Harvesting from New Zealand forests will increase over the next half decade, as crews work through the incentivised 1990s plantings, which peaked at a growth of forested area of almost 100,000 hectares in 1994. But, the yearly replanting and new plantings area over the past decade has often been less than the area harvested.

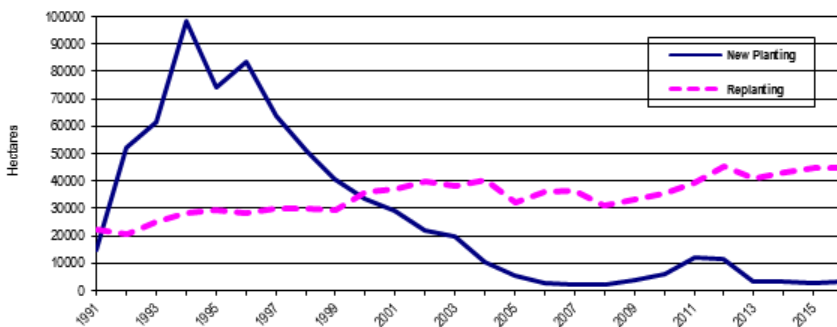
The seedling sale increase for 2016 is a positive sign the planting decline may be reversing.

A total of 49.3 million seedlings in the survey were Pinus Radiata, the highest total since 2012. Douglas fir was 2.2 million seedlings, the largest number since 2013, but showing a gradual decline in the past eight years.

Other softwoods and hardwood seedling numbers are both at their lowest in the past eight years.

Most of the surveyed nurseries anticipate total seedling sales will be higher again in 2017, with only one nursery expecting fewer sales volumes this year.

MPI expects new plantings for 2016 to be 3,500 ha, including 1,500 ha of Afforestation Grant Scheme area. MPI also estimates there will have been 44,500 ha of replanting carried over the past year.



Estimated areas of new planting and replanting. Estimates for 2016 are provisional
Source: MPI Provisional Estimates of Tree Stock Sales and Forest Planting in 2016, February 2017

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“It is quite an internal fight and hard to break out of the pattern,” she says. But, based on the US experience, she anticipates industry will be quickly asking to have this process applied to their incidents which will mean that forestry safety culture will change rapidly.

“The tipping point will be when 60 percent of companies are engaging in the process,” she says.

From Fiona Ewing’s FISC perspective, the

approach is less adversarial and the work has found the crews really appreciated being listened to, without fear or blame.

“At the end of the day we all want to get the guys home to their families.”

FISC will take the nuggets of learning from the pilot and case studies and communicate them across all levels of industry, using the Learning Review information sheet, a series of Learning Review alerts, animations and workshops.



ANNUAL GENERAL MEETING - FOREST GROWERS LEVY TRUST INC

Notice to Levy Payers

Notice is hereby given that the Annual General Meeting of the Forest Growers Levy Trust Inc will be held on:

Thursday 11 May 2017
1.00pm
ForestWood Centre Boardroom
Level 9
93 The Terrace
Wellington

Under Rule 13.4 of the FGLT Constitution, any actual levy payer may attend a general meeting provided that 2 business days’ notice is given to the Trust of the Actual Levy Payer’s intention to attend a General Meeting. For the avoidance of doubt, an Actual Levy Payer is any forest owner who paid the levy during the financial year 2016.

Any such person attending a General Meeting shall not be entitled to vote at that General Meeting unless that Levy Payer is a current member of the Trust.

The business of the Annual General Meeting will include receiving the Annual Report and Financial Statements of the Board, and any other business appropriate for an AGM.

As an Actual Levy Payer you are invited to attend the AGM in Wellington on 11 May to discuss the reports.

Please email admin@fglt.org.nz to advise of your intention to attend this meeting.

IN THE NEWS

JULIAN ELDER TAKES OVER AT SCION



Scion's new CEO, Dr Julian Elder, took over earlier this month, replacing retiring CEO Warren Parker.

Elder's background includes large scale infrastructure projects in waste treatment, water, telecommunications and energy through the Asia Pacific region.

He is recognised for his experience in commercialising technology and raising investment.

Dr Elder takes over as Scion is modernising its facilities to establish its Rotorua campus as a world leading hub for the forest industry, advanced manufacturing of wood and biomaterials and technology commercialisation.

TOI OHOMAI

Waiariki Institute of Technology merged with Tauranga's Bay of Plenty Polytechnic late last year to become Toi Ohomai Institute of Technology.

'Toi Ohomai' means to aim high and achieve great heights; to be awakened by learning. The name was gifted to the institution by local iwi and is a representation of institutional excellence that supports innovation, connectedness and motivates and inspires the people of the region.

Toi Ohomai already has almost 14,000 students, 1,000 staff and more than 150 programmes delivered at 68 sites around the Bay of Plenty and South Waikato regions.

Toi Ohomai is also the largest tertiary provider in the region, and one of largest institutes of technology in New Zealand. Toi Ohomai continues to champion forestry-focused education, and offers certificate level qualifications in forest harvesting and forest operations, as well as its two-year Diploma in Forest Management.

TOI-OHOMAI
 Institute of Technology

LIBERALISATION OF OIA

Developments in the regime around the Overseas Investment Act 2005 (OIA) are important for just about all overseas investors in New Zealand forests.

A senior associate at Russell McVeagh, Daniel Williams, says overseas investors in forestry sometimes have issues demonstrating how their investment will result in a 'substantial and identifiable benefit' to New Zealand beyond which hypothetical domestic investment would provide.

Late last year the government passed the Overseas Investment Amendment Regulations (No 2) 2016, providing new exemptions to the OIA regime.

Daniel Williams says the Overseas Investment Office (OIO) is still seeking further submissions from interested parties as to other possible exemptions.

"And Russell McVeagh is also engaging with the Treasury on its review of the ability for the OIO to give greater weight to long term benefits arising from an investment. This could be positive for overseas forestry investors given that they typically have long-term plans for their forestry investments and we'd like to hear from some more of those investors," Daniel Williams says.

