

The background of the slide is split into two horizontal sections. The top section shows a dense forest of tall, thin trees with green foliage. The bottom section shows a modern building with a large glass facade and a curved concrete path leading towards it. A thick, green, wavy graphic element runs vertically down the center of the slide, separating the two background images.

Sector consultation forums

April 2016



**Forest & Wood
Products Australia**

Key features of FWPA

- Industry services company
- Owned by members (160 members)
- Contract with the Australian Government
- Levies on growers, processors and importers
- Australia Government matching payments
- Arms-length director selection committee
- Directors voted by members
- Rolling 5-year strategic plan
- Annual operating plan

Measurable results

- 8-storey timber buildings
- Improved social license for wood
- Partnership with Planet Ark
- WoodSolutions building specifier program
- Impactful research outputs
- Forestlearning schools program
- Statistics aggregation and dashboard

Delivering an ROI

Evaluation:
category level
aggregation
(cumulative)

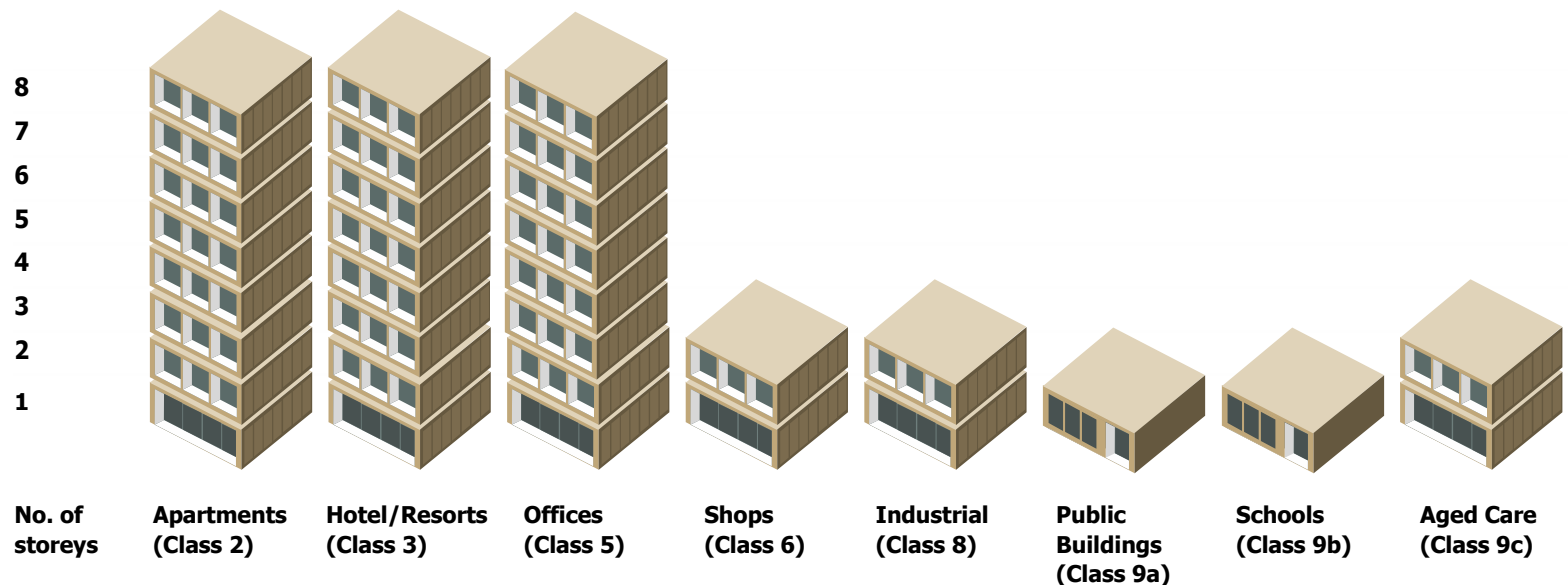
	No. of projects	Total Value Invested (\$)	No. of selected sample projects	Value of sample projects (\$)	Sample projects as a % of total investment	Weighted average BCR*	Estimated benefits from total investment (\$)
Growing category	83	17,494,232	4	887,211	6.6%	5.4	94,468,853
Processing category	52	11,425,235	2	193,000	1.7%	1.6	18,280,376
Marketing category	117	14,184,138	3	459,888	3.4%	35.9	509,210,554

* Note: BCR is determined by rolling 3 year average

The current analysis has shown that FWPA's generic marketing activities are estimated to have generated a gross return of \$230 million, achieving a BCR of 7.2.

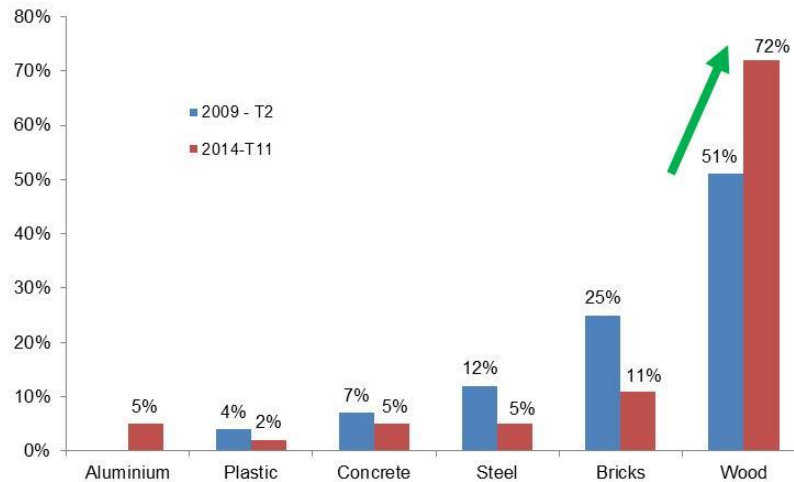
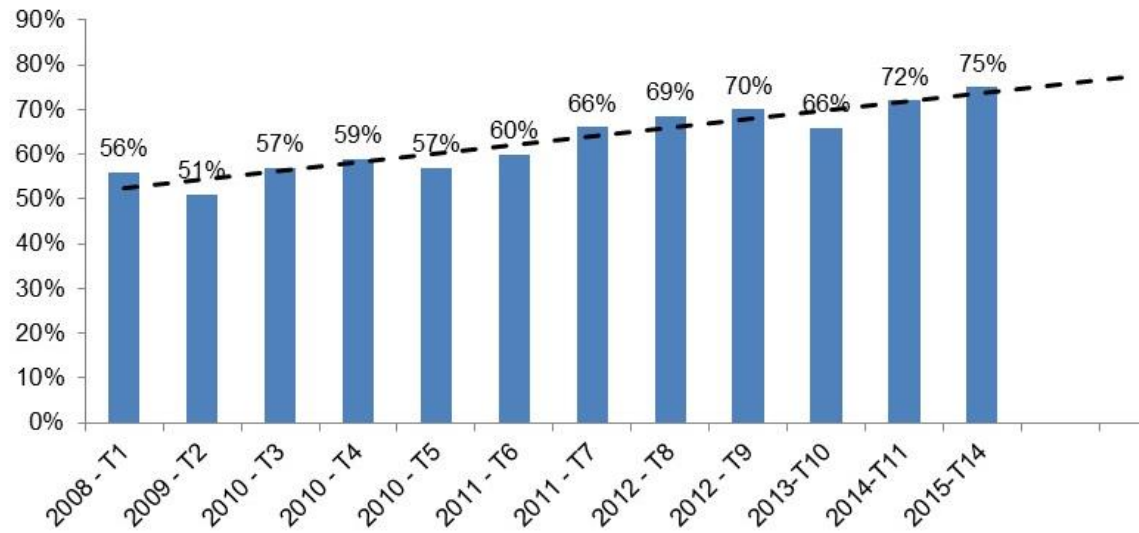
The Centre for International Economics (Oct 2015)

Changes to the National Construction Code



FWPA has secured 4 changes to the NCC including the DTS for lightweight and massive timber up to 25 metres Classes 2,3 &5)

Wood owns “environmentally friendly”

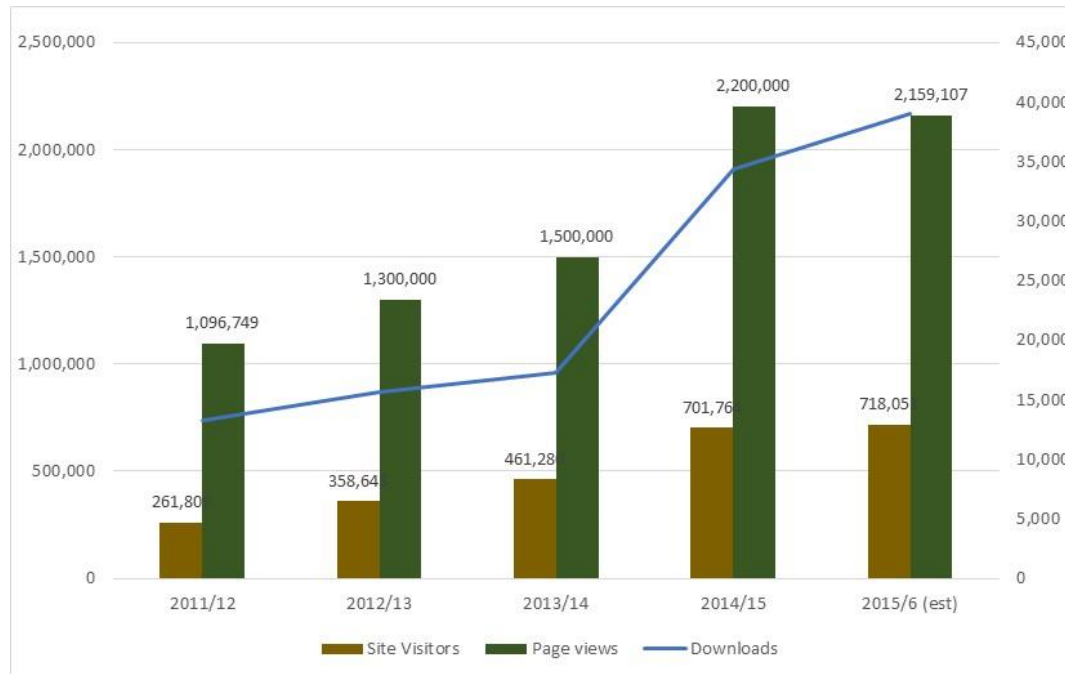


Source: Internet surveys
(n>=1000)
Sample reliability is 95%
confidence interval +/- 3%

Planet Ark helps provides reach and leverage



WoodSolutions has strong brand awareness and value



	Global Ranking
WoodSolutions (AUS)	597,303
Bluescope steel (AUS)	625,105
WoodWorks (US)	651,653
Trada (UK)	681,333
ReThink Wood (US)	1,676,734
WoodWorks (Cdn)	3,512,281
Think Brick (AUS)	5,650,936

Source: Alexis.com (19/4/16)

WoodSolutions continues to rank as the most visited wood promotion site in the English-speaking world

Research making a difference

- Operational LiDAR
- Genetics improvements (HW & SW)
- Cant-opti for heartwood detection
- Fire and acoustics for midrise buildings
- Panelised flooring systems
- Environmental credentials of wood products
- Forest and mill decision support tools

High quality teaching resources



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We provide educators with quality teaching resources relevant to the Australian Curriculum and with a focus on Australian forests and sustainable timber products.

SEARCH FOR A TEACHING RESOURCE BY:



THEMES



SUBJECT



YEAR



CODE

These educational resources provide insights into how Australian forests play a vital role in the provision of forest and wood products and environmental services for society. From how Australian forests deliver timber to produce renewable goods that many of us use on a daily basis, provide habitats for biodiversity and recreational spaces, and provide employment opportunities through active management operations that help sustain rural communities. To how forests help protect water quality through stabilising soils, and help combat global carbon emissions and air pollution through the storage of carbon in trees and wood products.

Better data now readily available

By industry sectors

Growers
Softwood sawmills
Hardwood sawmills

Industry confidential data

Type of data

Sales volumes
Weighted average price
Mill productivity
Safety statistics

Industry
aggregated data

Public
industry data

Imports
Exports
International trends

Data
dashboard

Key economic
data

Housing starts
GDP
Exchange rates

*Monthly Statistics Count
newsletter provides insights into
key data series and trends*



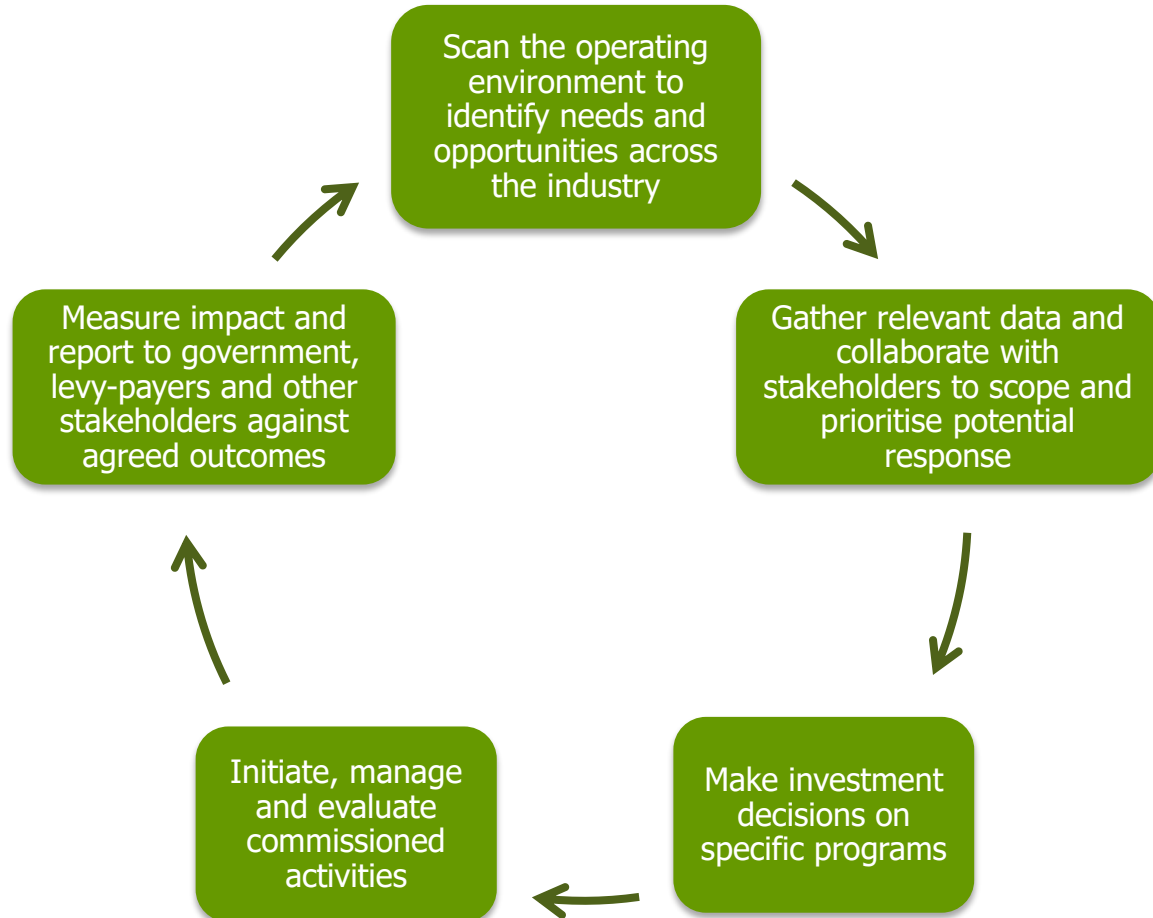
Realignment of strategic direction

Refining the 5-year plan

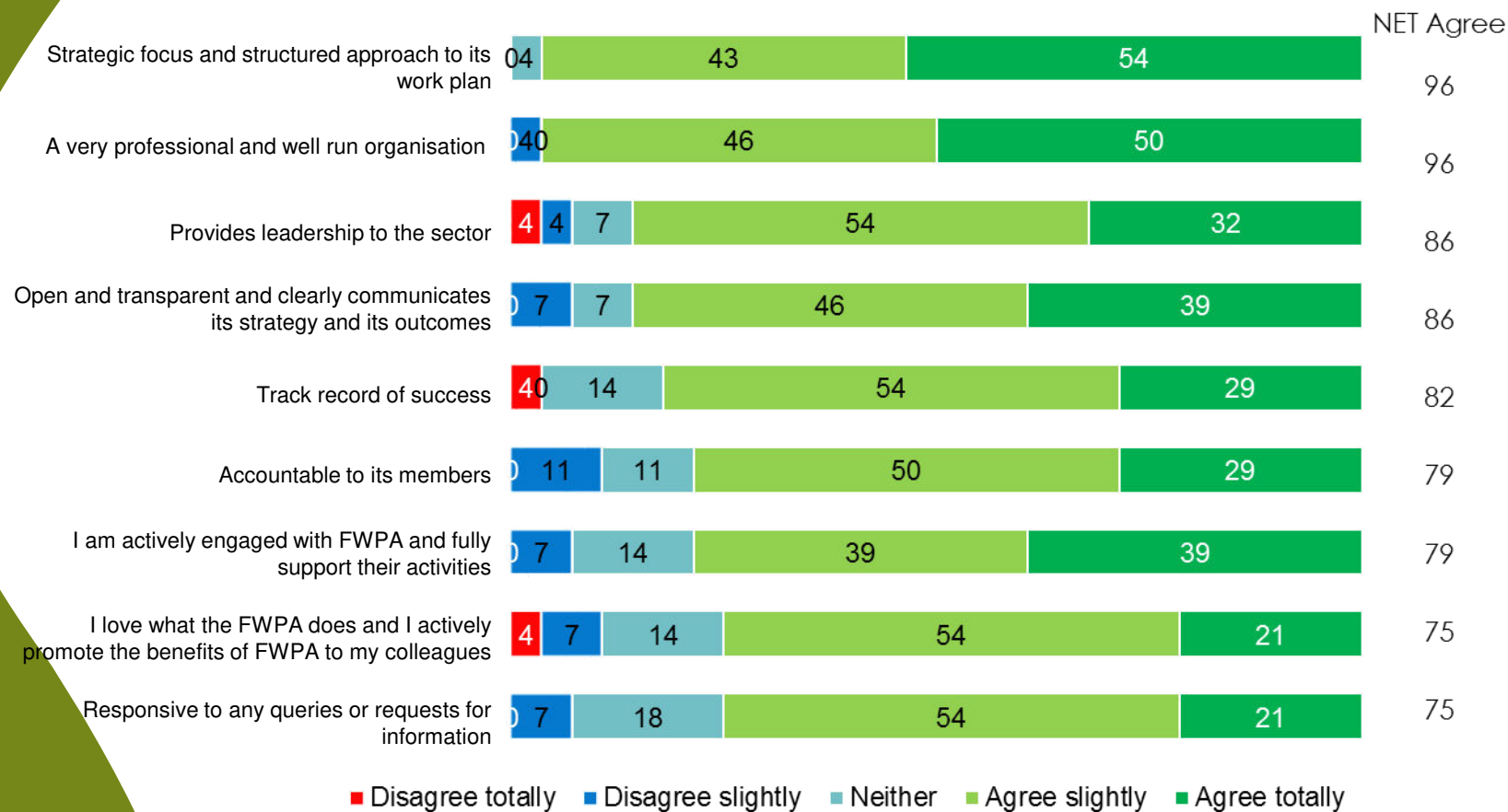


**Forest & Wood
Products Australia**

The operating model

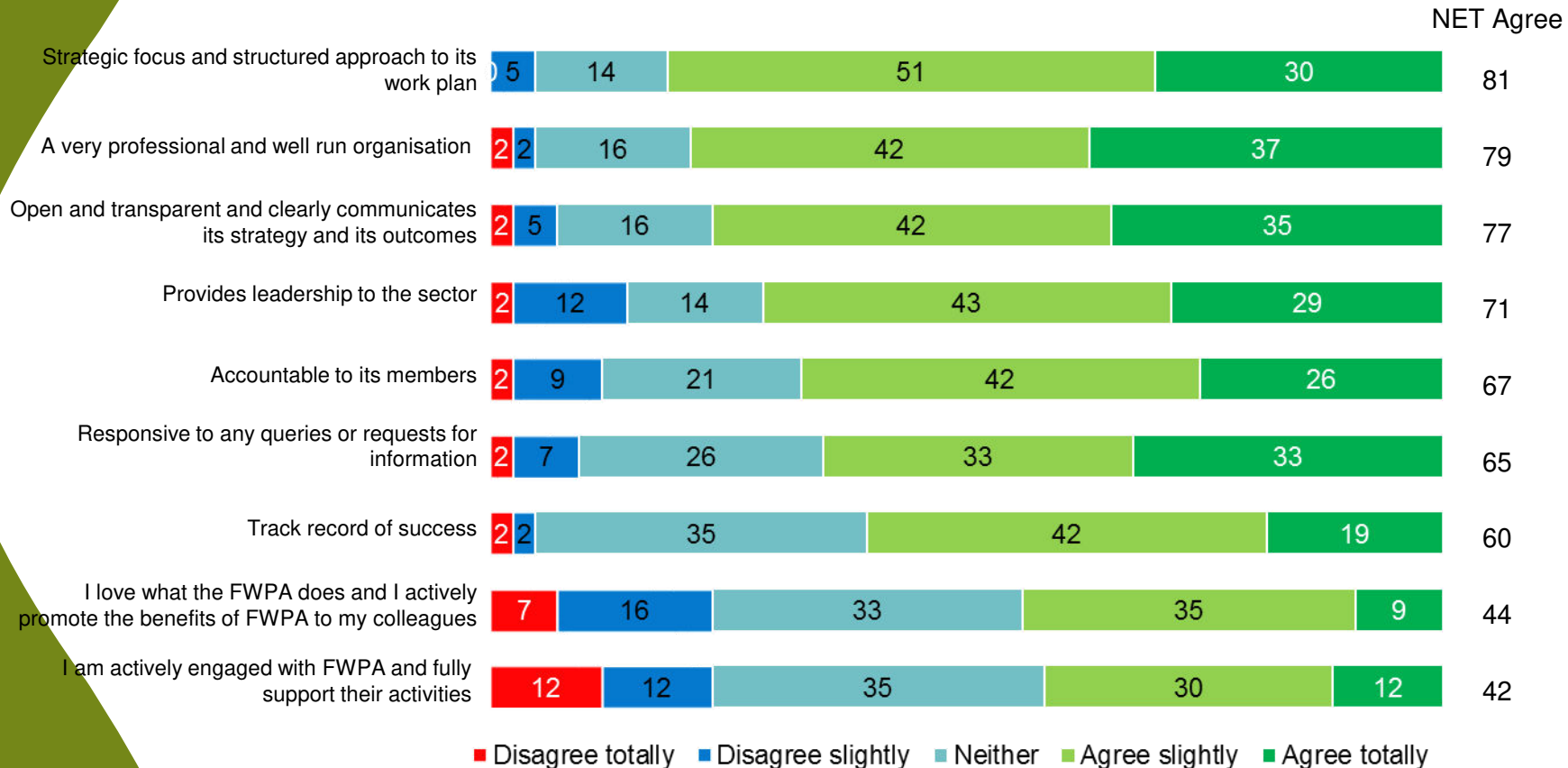


How advisory group members rate us



n=28 Advisory group members (Oct-Nov 2015)

How senior executives rate us



n=45 Senior executive FWPA members (Oct-Nov 2015)

FWPA's mission

We **collaborate** with government and industry **stakeholders** to determine strategy and deliver programs designed to **grow** the market for forest and wood products, increase **productivity** and **profitability** across the **value chain** and ensure positive environmental and social **outcomes**.

Desired outcomes

Increased Demand	Increased Community Acceptance	Increased Productivity and Profitability	Increased Sustainability	Increased Capability
<p>We will employ a range of strategies to boost demand, including:</p> <ul style="list-style-type: none"> • promoting the positive benefits of wood through education, promotion and advertising • improving the product knowledge of specifiers and consumers • addressing any perceived or real impediments to the use of wood in a range of applications. 	<p>We will increase the industry's social license to operate by:</p> <ul style="list-style-type: none"> • using social research to inform strategy • implementing targeted educational and promotional programs • leveraging strategic partnerships • making effective use of social and traditional media. 	<p>We will increase value chain productivity and profitability by:</p> <ul style="list-style-type: none"> • pursuing greater alignment between the initial resource and the finished product (tree to market) • improving market knowledge • ensuring products are fit-for-purpose, safe and durable with performance that meets user expectations • Minimising strategic and operating risk. 	<p>We will enhance the sustainability credentials of forest and wood products by:</p> <ul style="list-style-type: none"> • assisting the industry to identify, measure and manage the environmental and social impact of products and management practices • engaging with the community to engender positive attitudes to the industry. 	<p>We will impact decision making by providing readily accessible information that assists current and future industry participants to:</p> <ul style="list-style-type: none"> • adapt to changes in the business environment • achieve better commercial outcomes.

Measures of success

Increased Demand	Increased Community Acceptance	Increased Productivity and Profitability	Increased Sustainability	Increased Capability
<ul style="list-style-type: none">• Increased consumption.• Increased consumer and building specifier perception that 'wood is good'.• Improved perceptions of wood as environmentally positive and suitable material.• Greater understanding of the role of wood products in future construction applications.	<ul style="list-style-type: none">• Maintenance of social license relating to production and harvesting of wood.• Uptake of relevant teaching resources.	<ul style="list-style-type: none">• Increased capital investment in forest growing and processing.• Increased profitability along the value chain.• Industry benefits from company's investments are at least double the investment (i.e. benefit-cost analyses (BCA) greater than 2).	<ul style="list-style-type: none">• Increased acceptance of the sustainability credentials of the sector by consumers and building specifiers.	<ul style="list-style-type: none">• Uptake and usage of information and analysis• Industry support for skills development programs.• Attractiveness of the sector as a career opportunity.

Revised focus on outcome-driven programs

1. Promoting the advantages of wood products
2. Aligning products to market needs
3. Assisting value chain optimisation
4. Increasing resource availability and reducing risk
5. Impacting decision making and industry capability

New programs will draw upon functional expertise

	Previous Programs (now functional areas)				
	Generic Promotion (40%)	R&D Investments (40%)	Capacity and Education (3%)	Building Codes and Standards (8%)	Statistics and economics (9%)
Promoting the advantages of wood products (20%)*					
Aligning products to market needs (50%)					
Assisting value chain optimisation (15%)					
Increasing resource availability and reducing risk (10%)					
Impacting decision making and industry capability (5%)					

*Indicative share of expenditure

Relevance of programs to individual sectors

	Industry Sectors					
	Forest growers	Hardwood sawmillers	Softwood sawmillers	Engineered wood products	Importers	Exporters
Promoting the advantages of wood products	✓	✓	✓	✓	✓	
Aligning products to market needs	✓	✓	✓	✓	✓	✓
Assisting value chain optimisation	✓	✓	✓	✓		✓
Increasing resource availability and reducing risk	✓	✓	✓	✓		✓
Impacting decision making and industry capability	✓	✓	✓	✓	✓	✓

New initiatives

- Government matching payments for voluntary contributions
- Proposed trans-Tasman research consortium on design life and durability
- WoodSolutions technical field force funded through voluntary contributions for 3-year pilot
- Forest grower commitment to fund a 2-year program to review research and extension structures and priorities