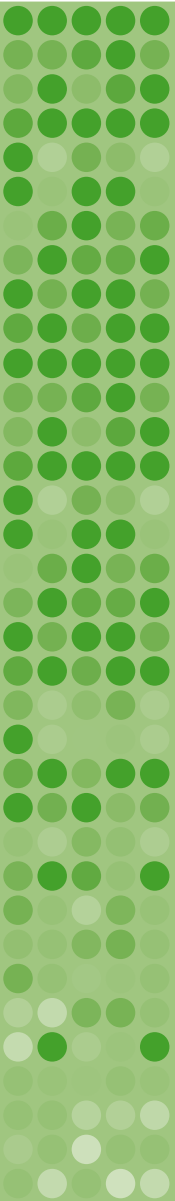




Queensland timber plantation strategy 2020

Supporting the sustainable growth of the timber plantation sector



Queensland timber plantation strategy 2020

Supporting the sustainable growth of the timber plantation sector

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Minister's foreword



The growing, processing, managing and selling of timber-based products is one of Queensland's oldest and most durable industries. Timber products and their production have been an integral part of the Queensland way of life since European settlement.

Today, Queensland's forest and timber production value chain is estimated to contribute around \$4 billion to Queensland's economy, employs more than 18 000 Queenslanders and is experiencing increasing demand underpinned by population growth.

The Queensland timber plantation sector is a key component of the forest and timber production value chain. Since the sector's establishment in the 1920s, the Queensland Government has driven its development by establishing 210 000 hectares of commercial timber plantations, mostly in the higher rainfall areas of south-east and north Queensland.

By the mid 1990s, timber plantations had become the dominant source of log timber for the forest and timber product industry, supplying around three-quarters of the total log timber processed in Queensland each year. This resource supports a competitive, integrated and adaptable timber processing sector that provides important income, employment and economic diversity to regional communities and the state as a whole.

As part of the Renewing Queensland Plan, the Queensland Government has recently sold the right to manage its commercial timber plantation estate. Transferring responsibility for the management and operation of the state's timber plantations to private interests is the final important step in a reform process that has progressively introduced commercial discipline into the management of publicly owned plantation resources in Queensland.

This is a key milestone for the forest and timber industry and, importantly, it signals a fundamental change in the role of government from direct participation in the market for plantation timber products, to one of leadership and strategic direction.

The *Queensland timber plantation strategy 2020* is the first of its kind for Queensland. It clearly articulates the Queensland Government's policy objective of encouraging new private investment in the timber plantation sector in a socially and environmentally responsible manner, while outlining key strategies and actions that the Queensland Government is committed to delivering to drive sustainable growth over the next decade.

This strategy has been developed following a public consultation process where a broad range of timber plantation stakeholders provided written submissions about the draft strategy that I released in late November 2009. It complements other key Queensland Government initiatives (including *Toward Q2: Tomorrow's Queensland*), helps to develop a diverse Queensland economy and contributes to my vision of accelerating the growth of Queensland's primary industries to \$34 billion by 2020.

The Queensland Government is committed to working with stakeholders and building collaborative partnerships to implement the strategy to support the sustainable growth of Queensland's timber plantation estate.

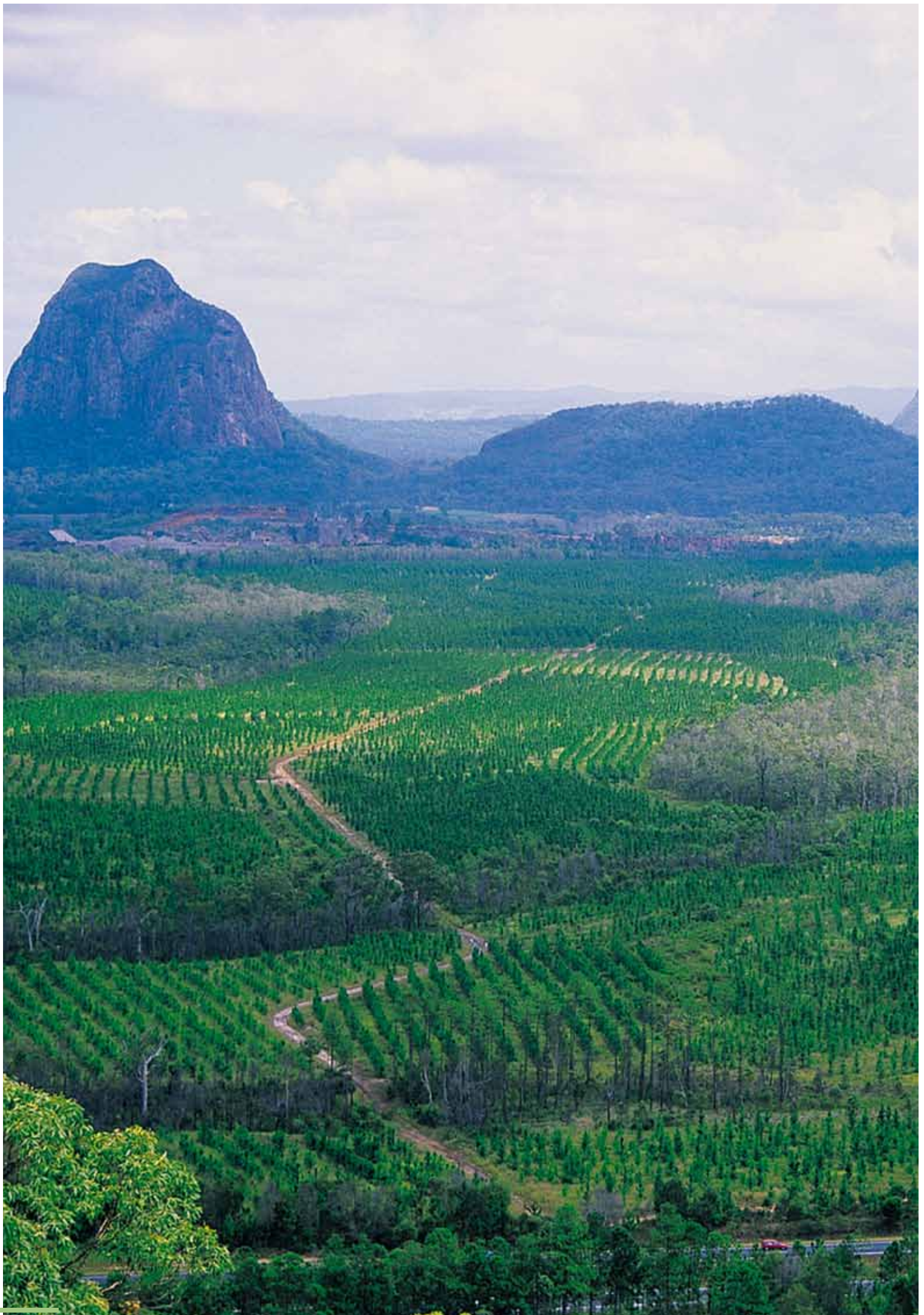


The Honourable Tim Mulherin MP

Minister for Primary Industries and Fisheries and Rural and Regional Queensland

Contents

Minister's foreword	iii
Queensland's timber plantation estate	1
Market outlook	5
Economic, environmental and social benefits	9
Forest policy framework	11
The strategy	15
Focus area 1: Land-use planning framework	16
Focus area 2: Legislative and policy projects	17
Focus area 3: Investment initiatives	18
Focus area 4: Targeted industry development support	19
Focus area 5: Community education	21



Queensland's timber plantation estate

Timber plantations are purpose-planted tree crops for the production of timber, fibre, biomass and other commercial outcomes. They usually contain a single tree species that has been specifically selected for its fast growth and wood quality, or for other characteristics. Consistent with other long-term agricultural crops, the primary intent of developing timber plantations is for them to be harvested on a periodic basis to provide a range of timber products that the market values.

The focus of the *Queensland timber plantation strategy 2020* is on those timber plantations that are intended to be harvested. However, timber plantations may also be utilised for a number of non-timber commercial outcomes such as seed and foliage collection, land rehabilitation, beneficial waste water re-use from coal seam gas extraction and municipal water treatment plants, carbon sequestration and bee keeping as a supplement or complement to timber production.

The timber plantation sector includes:

- large industrial-scale timber plantations (including those on state-owned land)
- smaller scale (farm forestry) timber plantations that are integrated into existing farming enterprises.

Timber plantation crop rotation length can vary from around 4 to 50 years, depending on factors such as species, site productivity, market prices and end-product uses. The shorter rotation crops are grown for biomass, energy and fibre production, whereas higher value solid wood products (framing timber, furniture etc.) generally require a much longer rotation cycle. However, improvements in processing technology means that it is now possible to produce structural and furniture timber from plantation-grown Australian hardwoods that are less than 10 years old.

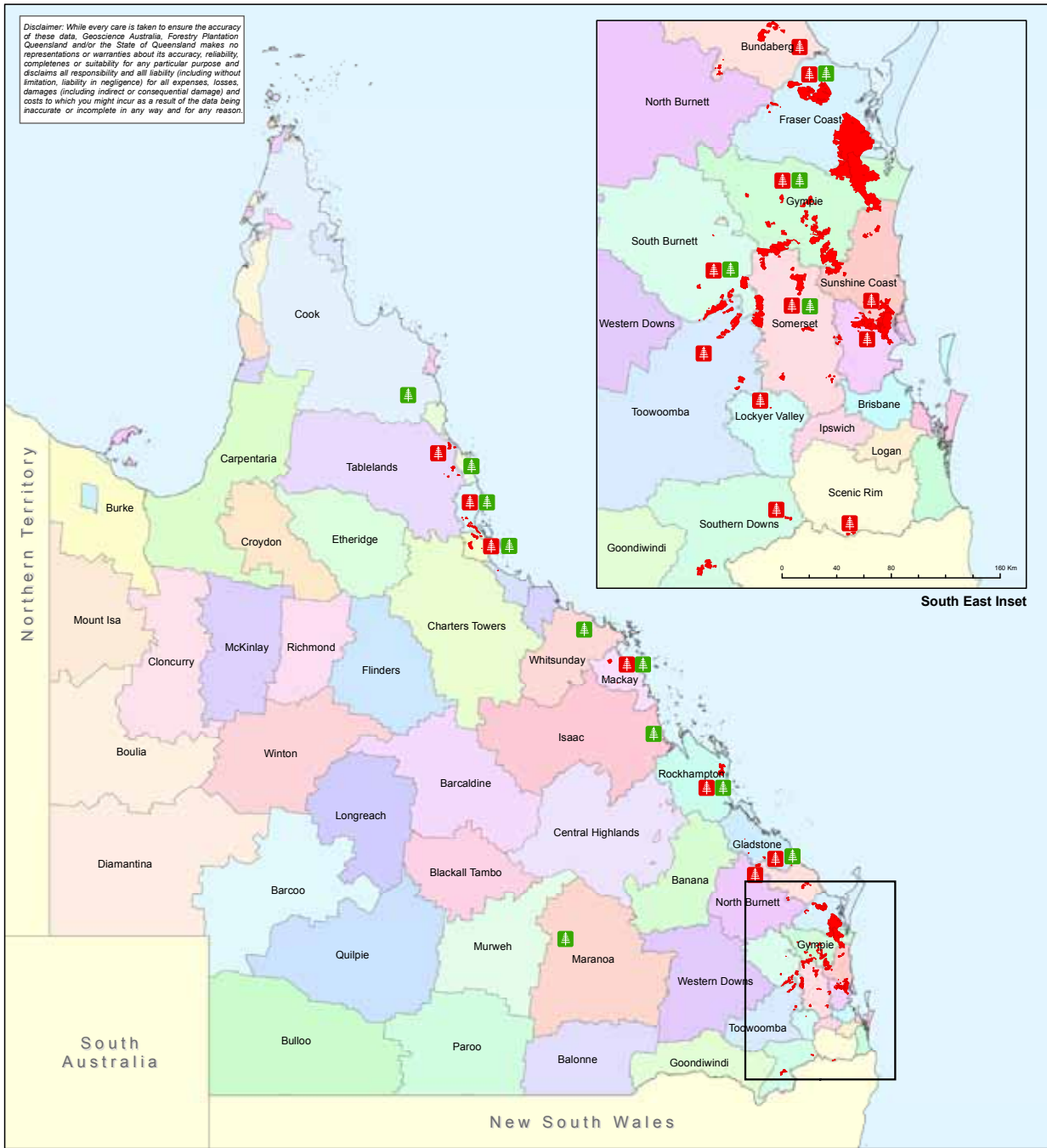
The terms 'softwood' and 'hardwood' describe the grouping of particular tree species with similar wood qualities or properties. Wood properties of softwood and hardwood timber differ in terms of cell type, number and arrangement. This affects durability, density and hardness. Softwood timber is generally of a lower density and hardness compared to hardwood, although the criteria can only be loosely applied as there is considerable variation within and between the two groups.

The overwhelming majority of Queensland's current timber plantation estate is in the coastal, higher rainfall zones of south-east Queensland. As shown in Figure 1 (overleaf), other commercial timber plantations have been established in both central¹ and north Queensland, as well as in the Burnett region of south-east Queensland.

As a long-term agricultural crop, timber plantations require suitable rainfall, soil and topography. Other economic, legislative and social factors can also impact on decisions about the location of new timber plantations. These include access to appropriate transport, markets and processing infrastructure; proximity to existing commercial timber plantations; land parcel sizes and prices; local community views about plantations; and government legislative requirements.

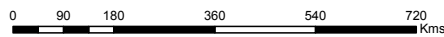
Queensland currently has over 250 000 hectares of timber plantations (planted area), or about 13 per cent of Australia's overall timber plantation estate. Over 75 per cent of Queensland's timber plantation estate comprises softwood species, is in a mature harvesting and replanting situation, and is being managed for solid wood products. The remainder of the plantation estate comprises hardwood species, is relatively immature and is being managed for both fibre and solid wood products.

¹ One of Queensland's largest timber plantation owner/managers recently announced that they intend to liquidate most of their central timber plantation estate due to the impacts of the *kirramyces* leaf blight on the commercial performance of this estate.



🌲 Other Plantations
 🌲 Public Plantations
■ Forestry Plantations Queensland Managed Areas
 Shire Boundaries
~ Water Bodies / Ocean

Scale - 1:8,000,000



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For further information on DEEDI services and centres, contact the DEEDI Business Information Centre on 13 25 23 or visit the DEEDI Web site at www.deedi.qld.gov.au/
 Produced by Spatial Strategy and Integration from information provided by officers of DEEDI and other Queensland Government agencies.

Figure 1. Commercial timber plantation resources in Queensland





Market outlook

The medium-term market outlook for timber products in Queensland is very positive. This is underpinned by a number of factors, including continued strong population growth in Queensland and increasing demand for housing and other timber-based products. For example, a recent report forecasted that over the next decade three local government areas in south-east Queensland would experience the largest demand for new houses of all 669 local government areas in Australia.² The expectation of an increasing market preference for sustainable products and the emergence of new non-timber commercial opportunities also contribute to the positive market outlook.

Over the last 15 years, there have been changing trends in the market for timber products in Queensland—most notably, the substitution of hardwood with plantation-sourced softwood for house framing, and the increased use of hardwood timbers for high-value products such as timber flooring and furniture. Overall, the use of sawn hardwood (mainly for housing construction) has decreased, while the demand for sawn softwood, paper products and engineered wood products (wood panels and load bearing products) has continued to increase.

Queensland's softwood timber plantation estate currently supplies over 2 million cubic metres of log timber each year, and an estimated 450 000 cubic metres of log timber is currently sourced from state-owned and private native forests. Recycled timber also plays a relatively modest, but important role in supplying the market with timber products.

However, Queensland's mature softwood timber plantation estate, native forests and the recycled timber segment are currently experiencing supply constraints. Therefore, expansion of the timber plantation estate is the most viable means of expanding the capacity of the Queensland forest and timber industry to meet increasing demand for timber products. Enhanced supply from new timber plantations will also help to improve Queensland's current trade deficit in timber and timber-based products (see Figure 2 overleaf).

Queensland has a long history of growing and processing timber plantation products that is supported by extensive land resources, a suitable growing climate, sound technical plantation skills, strong research and development, and a vibrant and a stable business environment. In particular:

- Queensland's mature timber plantation estate has demonstrated sound risk and reliable financial return profiles
- strong, integrated and competitive processing sectors have been established to provide a wide range of markets for timber plantation products, especially in south-east Queensland
- suitably located ports, relatively low port charges and proximity to emerging timber product markets in India and Asia provide a range of potential export market opportunities for both log timber and processed timber plantation products.

Queensland currently has the second-smallest timber plantation estate of all Australian states, with timber plantations accounting for less than 1 per cent of Queensland's total land area. Although about 60 000 hectares of new timber plantations have been established in Queensland since 2000, this growth is relatively modest compared to a number of the southern states. Therefore, there is considerable scope to sustainably expand Queensland's timber plantation estate to enhance the economic diversity of a number of regional areas.

² Housing Industry Association 2010, *Housing to 2020 report*, Housing Industry Association, Sydney.

However, the sector is facing a number of challenges and is considered to have a relatively higher risk profile in Queensland compared to other Australian states. These challenges include a range of technical issues, such as the need for more commercially proven, improved planting material and plantation management strategies suitable for Queensland’s varied climate and growing conditions (particularly for hardwood plantations); cost-effective pest and disease control strategies; and additional plantation product and processing research, particularly for early return wood products.

From an investor point of view, Queensland’s planning framework is complex and uncertain in comparison to other Australian jurisdictions. In particular, some local governments in Queensland have introduced complex development assessment processes compared to those used for similar competing long-term agricultural land uses.

The *Queensland timber plantation strategy 2020* will coordinate and enhance the Queensland Government’s policy and resources to create an ‘investor-ready’ environment to support a productive, competitive and sustainable timber plantation sector. In particular, the strategy identifies the focus areas and actions that will be pursued by the Queensland Government to respond to the current industry challenges, and articulates the Queensland Government’s ongoing commitment to support the sustainable development of the timber plantation sector. It also sets out a number of guiding principles, including consistency with national and Queensland forest policies and recognition that successful implementation will require close and ongoing collaboration between industry and government.

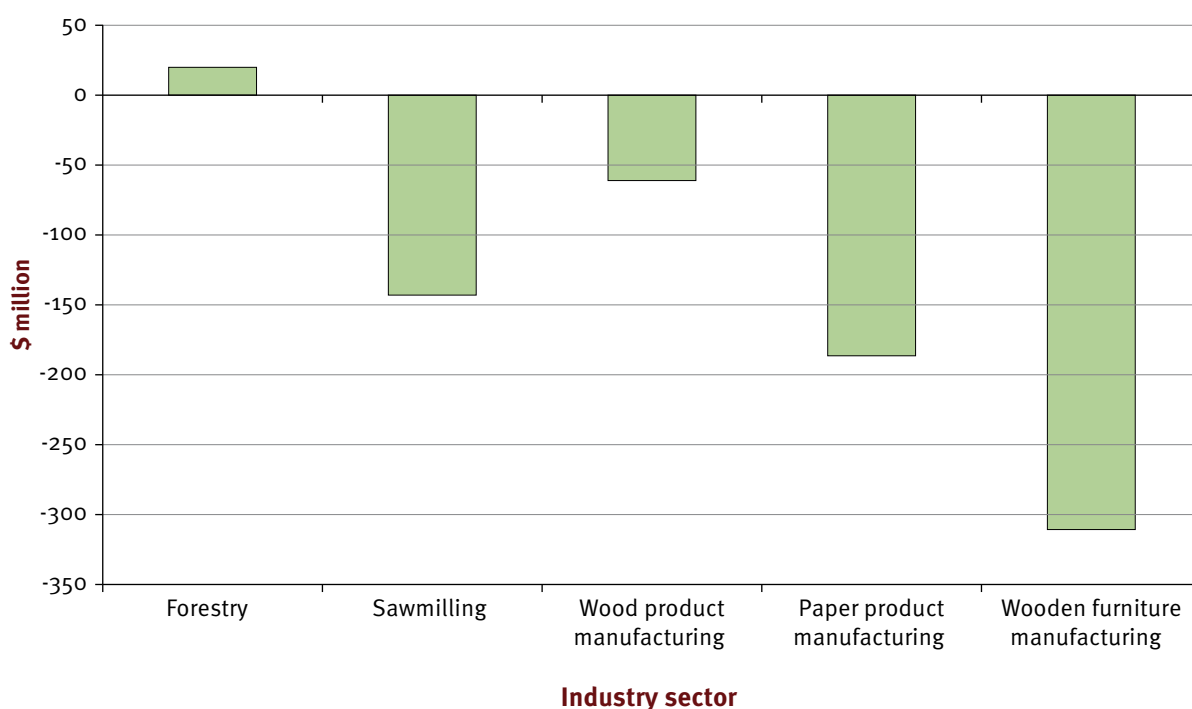
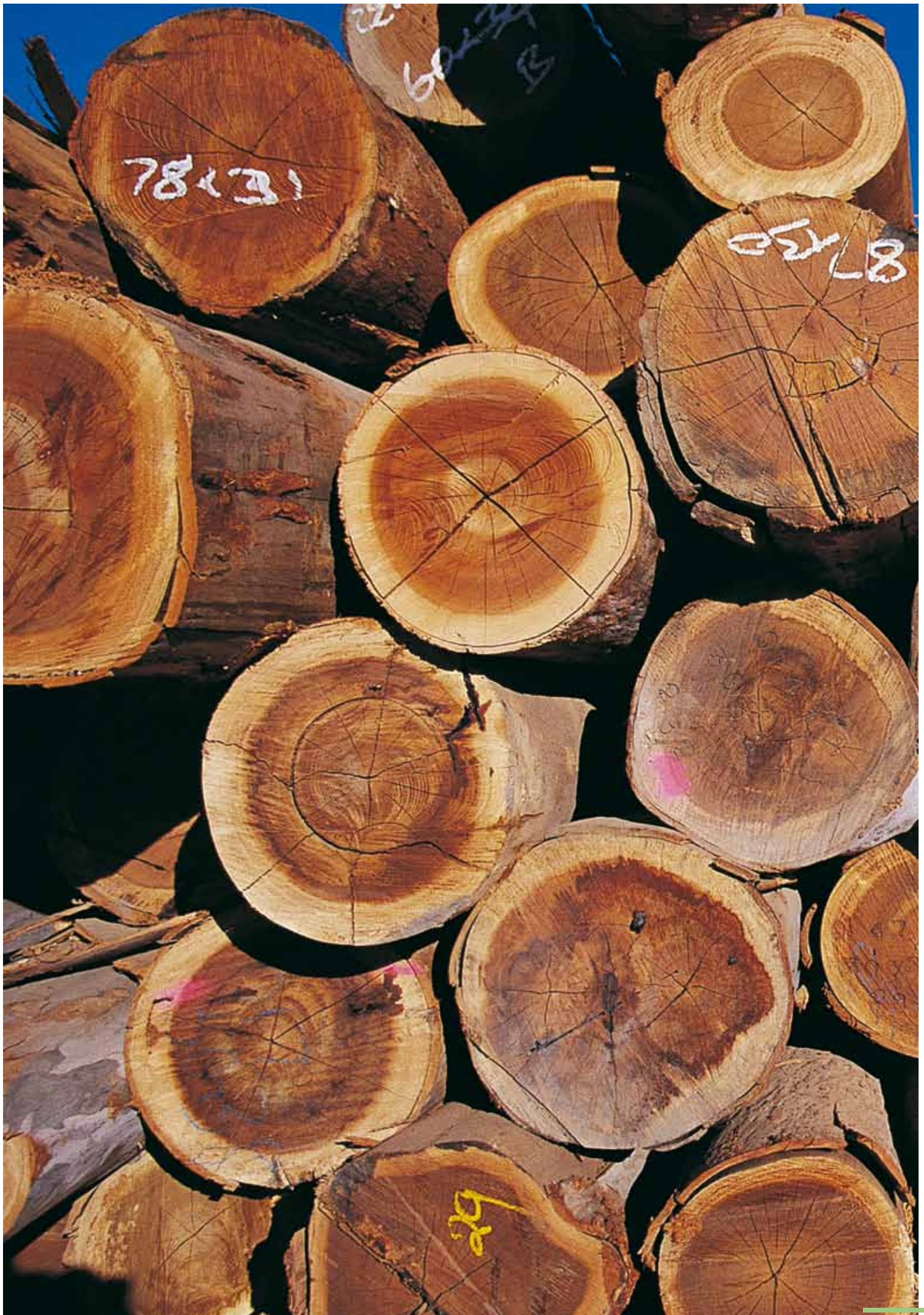
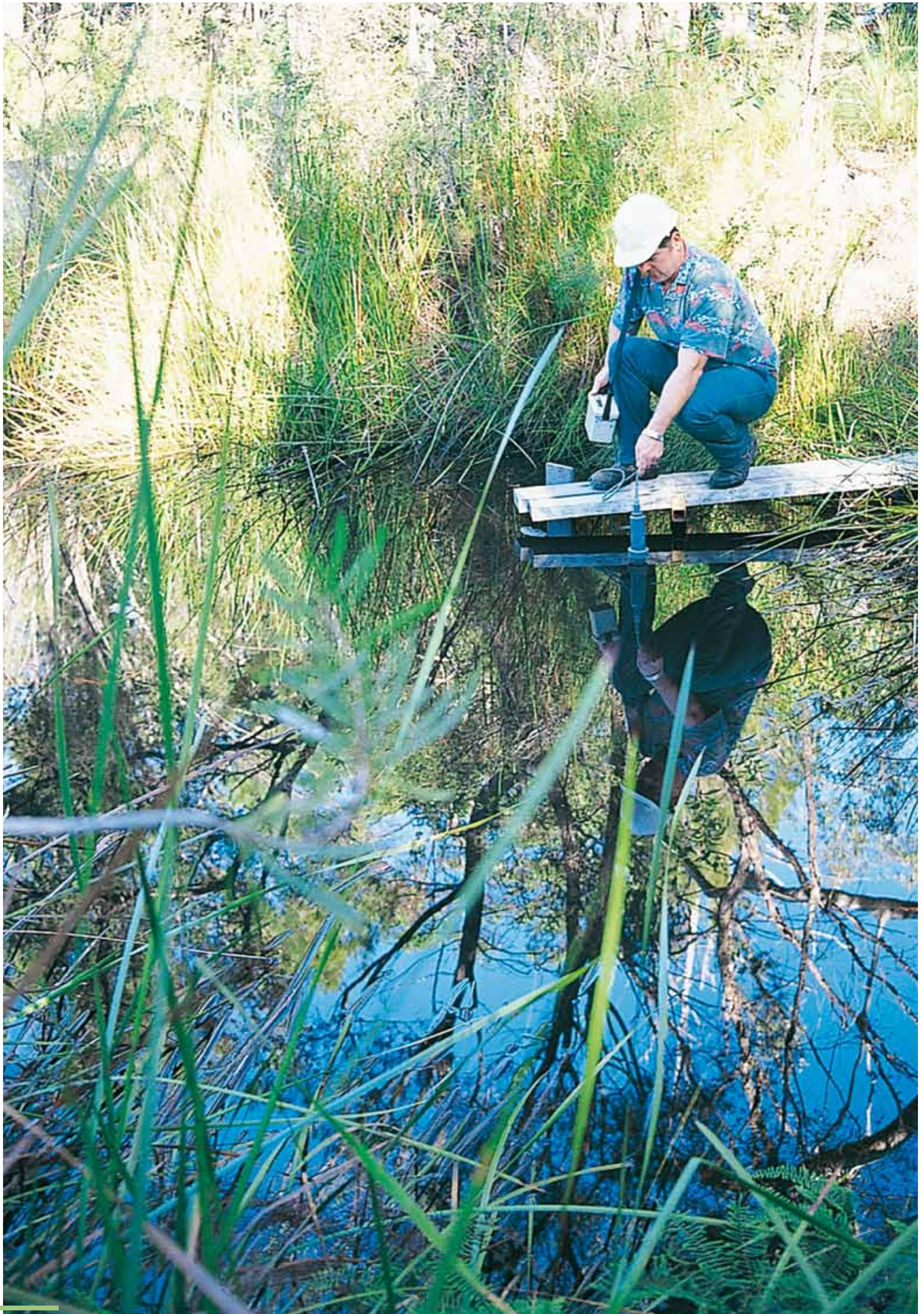


Figure 2. Queensland’s trade balance in timber and timber-based products





Economic, environmental and social benefits

New timber plantations (particularly large-scale timber plantations) will deliver economic activity and employment benefits to Queensland, as well as potential processing and other value-adding opportunities. The former Department of Primary Industries and Fisheries estimated that for every \$1 of value added generated by the forest industry in Queensland, an additional \$1.80 of value added is generated in the Queensland economy. The research also reported that for each full-time equivalent job in the forest industry, another 1.3 full-time equivalent jobs are created in the broader Queensland economy.³

Another study undertaken on behalf of Timber Queensland (Queensland's peak forest and timber industry association) found that the softwood plantation timber processing sector in Queensland generated over \$570 million in direct sales from 2.25 million cubic meters of log timber processed, and directly employed almost 1800 people and a further 670 employees in contracting businesses.⁴

Timber plantations also deliver a range of environmental benefits, including removing carbon dioxide from the atmosphere and releasing oxygen as part of the growing process. In a typical timber plantation situation, 20 mature trees can absorb about 1 tonne of carbon dioxide per year.

Timber plantations also have the potential to:

- improve biodiversity (particularly plantations comprising native species) when compared to some other commercial land uses
- offset demand for native forest timber products and unsustainably (and possibly illegally) harvested imported timber products
- provide salinity, water interception and erosion benefits.

Timber plantations on Crown land in Queensland are also accessible to the public for a range of recreational and other activities.

New commercial opportunities for timber plantations as carbon sinks may also be generated by international and/or national carbon dioxide and other emission trading schemes, despite the plantations being harvested. Timber plantations (particularly large-scale plantations) are typically harvested on a rotational basis as opposed to the entire estate at one time. Therefore, in these multi-age timber plantations there will continually be both immature and mature trees capturing carbon. The sustainable amount of carbon captured over the timber plantation estate may be traded to industries seeking to offset emissions, despite harvesting occurring on a regular basis.

³ Department of Primary Industries and Fisheries 2004, *The Queensland forest industry—an overview of the commercial growing, management and processing of forest products in Queensland*, Department of Primary Industries and Fisheries, Brisbane.

⁴ MBAC Consulting 2005, *A socio-economic assessment of the plantation processing sector in Queensland*, MBAC Consulting, Perth.



Forest policy framework

The Queensland Government has played an integral role in the development of the timber plantation sector since its inception, including:

- investing in the establishment of approximately 80 per cent of the state's current commercial timber plantation estate
- undertaking most of the research and development work that has supported the sector's development
- establishing the legislative and policy framework for the management of the state-owned plantation timber estate and the sale of timber products from this estate.

In line with key national policies (such as the *National forest policy statement*), the Queensland Government has progressively reshaped forest policies over the last decade in response to changing community perceptions about the role of native forests—in particular, their economic and environmental contributions to Queensland.

The historic South East Queensland Forests Agreement was signed in September 1999 by the Queensland Government, the timber industry and conservationists. It provides a vision for the future management of state-owned forests in south-east Queensland, and a secure and sustainable hardwood timber industry based upon a timber plantation resource and value-adding processing. Under the agreement:

- approximately 425 000 hectares of state-owned native forests are being designated as new conservation areas in which timber harvesting will no longer be permitted—by 2025, the area of conservation reserves in south-east Queensland will be more than 1 million hectares
- the timber processing sector has been provided with 25-year sales permits that guarantee hardwood sawlog supply, providing unprecedented supply security for sawmills in south-east Queensland and confidence to invest and create jobs in regional and rural towns
- the native hardwood timber processing sector will transition from one largely based on log supplies from state-owned native forests, to one based on supplies from timber plantations and private native forests—the Queensland Government committed to the establishment of an initial 5000 hectares of new native hardwood timber plantations as part of the agreement.

As a result of the success of the agreement, the Queensland Government proceeded with the Statewide Forest Process in 2001 for those state-owned native forests outside south-east Queensland. The broad aims of the process are to provide certainty to the timber processing sector and to protect high-conservation value areas.

In 2004, the Queensland Government (in consultation with stakeholders) announced a plan for managing state-owned native forests and stabilising the timber processing sector in the western hardwoods region of Queensland, including:

- adding over 1 million hectares of western hardwood, state-owned native forests to the conservation estate
- reducing state native forest sawlog allocations, transitioning the timber processing sector to timber plantations and private native forests, and completing harvesting in approved areas of state-owned native forests by 31 December 2025
- developing long-term (to 31 December 2025) timber supply agreements with sawmills that continue to access state-owned timber supplies
- expanding its native hardwood timber plantation estate commitment to 20 000 hectares.

In line with the 1997 national strategy, *Plantations for Australia: The 2020 Vision*, the Queensland Government has already been working with the Queensland timber plantation sector, potential investors and other stakeholders to facilitate the establishment and expansion of a privately-owned timber plantation sector in Queensland.

Key initiatives include:

- a Queensland Government – landowner joint venture scheme to establish new timber plantations on privately owned land (that was rolled into the South East Queensland Forests Agreement plantation initiative)
- a number of policy initiatives designed to enhance plantation development, such as the development of Queensland tree tenure legislation and the identification and reform of a number of legislative and administrative impediments to plantation establishment
- enhancing industry efficiency and capability by investing in extensive plantation research and development
- building industry capacity through the funding and provision of plantation extension and industry development support.





Photograph supplied by Kennedy's Classic Aged Timbers

The strategy

The *Queensland timber plantation strategy 2020* articulates the Queensland Government's policy objective of securing sustainable growth in the timber plantation sector to deliver a range of economic, social and environmental benefits to Queensland. It is a whole-of-government strategy that will coordinate and enhance the Queensland Government's efforts to support the timber plantation sector.

The guiding principles for the strategy are consistent with national and Queensland forest policies and strategies, and include:

- recognition that the market and economic considerations will determine the eventual size, composition and location of Queensland's timber plantation estate
- recognition that the long-term nature of timber plantation investment requires stable and transparent government policy settings in order to minimise changes to government policy and regulation over time
- recognition that the successful implementation of this strategy will require close and ongoing collaboration between industry and government
- the need for a competitive business environment
- a commitment to identify and address legislative and administrative impediments that adversely affect the timber plantation sector
- assurance that actions by government to assist timber plantation sector development demonstrate net economic, social and environment benefits to the wider community
- support for the sustainable management of commercial timber plantations in accordance with best practice international forest management principles and forest certification systems
- review and refinement of the strategy to ensure that it is delivering its overall objective.

The Queensland Government will concentrate its timber plantation development activities in five focus areas over the duration of the strategy, which include:

1. land-use planning framework
2. legislative and policy projects
3. investment initiatives
4. targeted industry development support
5. community education.

The Queensland Government will collaborate with industry participants and stakeholders to implement the strategy and, in particular, work with relevant partners to scope and implement appropriate projects in relation to specific actions.

Focus area 1: Land-use planning framework

The Queensland Government has established a policy position that timber plantations are a legitimate primary production activity and therefore should be treated more in line with other cropping activities for general land-use planning purposes in Queensland.

However, some local governments have introduced relatively complex development assessment processes for timber plantations in their planning schemes. In particular, establishing new timber plantations as impact assessable development by some local governments represents a significantly higher regulatory burden (with considerably more uncertainty about the outcome) compared to other cropping activities that are generally not subject to any formal local government development assessment processes.

Action 1.1

We will recognise timber plantations as a legitimate form of agricultural cropping for general land-use planning purposes in the Queensland Planning Provisions developed under the *Sustainable Planning Act 2009*.

Action 1.2

We will develop a timber plantation development assessment code within the Queensland Planning Provisions and cap the level of assessment for timber plantations at 'code assessable' in local government planning schemes by December 2010 (in consultation with local governments and the timber plantation sector).

This important policy initiative will help to ensure that the development assessment process for timber plantations is more in line with long-term agricultural cropping activities, and improve the consistency of timber plantation development assessment processes in Queensland.

Action 1.3

We will provide technical assistance to local governments and the timber plantation sector, as required, regarding the implementation and operation of the timber plantation development assessment code.

Action 1.4

We will facilitate regular discussions between representatives from the Queensland Government, local governments, the Local Government Association of Queensland and industry to discuss and resolve timber plantation planning issues.



Focus area 2: Legislative and policy projects

The timber plantation sector requires a stable, transparent and supportive regulatory environment that encourages new investment, innovation, accountability and continued growth in Queensland's timber plantation estate.

Changes to government policy and regulation is a key investment risk factor for the timber plantation sector. This strategy will reduce the risk of such changes by providing a clear, whole-of-government commitment to legislative and policy frameworks that support the growth of the timber plantation sector.

Action 2.1

We will finalise transfer of the right to manage and operate timber plantations on state-owned land to the private sector as part of the Renewing Queensland Plan.

This will inject significant new private investment into the Queensland timber plantation sector, improve the operation of the timber product market and eliminate the inherent distortions arising from direct state government participation in the market for timber products.

Action 2.2

We will develop timber procurement and sustainability policies that recognise credible international third-party certification as meeting the highest possible environmental standards, thereby supporting Queensland-produced plantation timber products.

Action 2.3

We will review and address Queensland legislation and administrative arrangements, as appropriate, to identify and seek to resolve impediments to timber plantation investment and growth.

A review of the Queensland Tree Tenure System (QTTS – contained in the *Forestry Act 1959*, the *Land Title Act 1994* and the *Land Act 1994*) is underway and the Queensland Government will provide its position with respect to the future operation of the QTTS as part of the review process. *The Timber Utilisation and Marketing Act 1987* has been reviewed with a recommendation to repeal the Act.

Action 2.4

We will work with other levels of government to facilitate supportive policy environments for the timber plantation sector, particularly in relation to issues such as the National Water Initiative outcomes, carbon trading, illegal logging, renewable energy initiatives, biosecurity systems, harvested wood product and climate change accounting framework issues, and timber procurement policies.

Action 2.5

We will collaborate with the Australian Government to seek to remove the existing export controls on Queensland unprocessed plantation-sourced timber products contained in the Australian Government's *Export Control Act 1982* and its subordinate legislation.

Focus area 3: Investment initiatives

Timber plantations are long-term operations with crop cycles that can last up to 50 years. They are also non-liquid assets with relatively high establishment costs, high risks and long periods of time between investment for establishment and income generated from the sale of timber. These characteristics mean that attracting investment in new timber plantations has been difficult.

Action 3.1

We will ensure delivery of the final phase of a 20 000 hectare native hardwood plantation estate (to be delivered by the new plantation operator), that will:

- provide a resource supply for the timber processing sector following the end of hardwood logging from state-controlled native forests
- encourage new private investment in timber plantations and processing in the region.

Action 3.2

We will undertake a timber plantation land capability and suitability project in consultation with relevant stakeholders.

The outputs from this project will broadly inform investment decisions of investors in timber plantations and processors, as well as assist state and local government strategic planning processes.

Action 3.3

We will prepare web-based and other information products to promote timber plantation investment opportunities in Queensland.

Action 3.4

We will identify and facilitate commercial opportunities for timber plantations that may arise from carbon trading (in cooperation with industry participants and stakeholders).

This will include reviewing Queensland legislation to ensure that Queensland businesses can effectively participate in potential international and/or national emission trading schemes, as well as other voluntary emission offsets.

Action 3.5

We will collaborate with the Australian Government, peak industry bodies and other stakeholders to identify potential new investment sources for new timber plantations.

Action 3.6

We will give potential major investors in the timber plantation sector access to Queensland Government project facilitation services.



Focus area 4: Targeted industry development support

The Queensland Government, in consultation with industry participants, will deliver a range of targeted industry development actions for the Queensland timber plantation sector to facilitate sustainable growth and deliver net economic benefits to the wider community.

Action 4.1

We will identify a dedicated unit within the Department of Employment, Economic Development and Innovation (DEEDI) to coordinate the implementation of this strategy and provide an initial contact point for information about the Queensland timber plantation industry.

Action 4.2

We will continue to identify and invest in targeted priority research and development projects to support the development of the timber plantation sector.

Key investment areas currently include:

- development of commercially proven, improved planting material suitable for Queensland's climate and growing conditions
- development of effective timber plantation management strategies
- tree physiology research to support a range of commercial outcomes, including carbon sequestration
- identification of cost-effective control strategies for endemic pests and diseases
- development of profitable and sustainable early return wood products and production processes, including sustainable systems to protect in-service forest products from deterioration.

Action 4.3

We will collaborate with the timber plantation sector, training providers, other Queensland Government agencies and Forestworks (the industry's training advisory body) to ensure that the industry has access to appropriate training and skills development opportunities in Queensland.

Action 4.4

We will support the timber plantation sector to develop and maintain an effective biosecurity framework in line with the objectives of the *Queensland biosecurity strategy 2009–14* and with national biosecurity arrangements.

Action 4.5

We will support timber plantation sector growth through DEEDI's Plantation Industry Development project, which delivers two industry development officers.



Action 4.6

We will work with the timber plantation sector, prospective investors and peak bodies to identify, clarify and support new market opportunities for timber plantations, particularly in relation to international and/or national emission trading schemes, voluntary emission offsets and bioenergy opportunities.

Action 4.7

We will continue to progress whole-of-government actions led by the Queensland Fire and Rescue Service (and involving the Department of Environment and Resource Management and other relevant agencies) to make the timber plantation sector and rural communities more resilient to bushfire risk. This will be achieved through increased levels of inter-agency cooperation with respect to fire protection policy development and planning, and fire management strategies.

Action 4.8

We will identify and plan for the sector's future infrastructure requirements within or adjacent to Queensland's timber plantations.

Action 4.9

We will encourage large and small timber plantation growers and processors to use credible 'third party' forest certification and chain-of-custody schemes to support ongoing market access for Queensland timber plantation products and enhance the overall sustainability of the sector.

Action 4.10

We will work with industry organisations and networks to help build their capability to support industry growth.

Action 4.11

We will promote small-scale timber plantings as part of integrated farming enterprises to help enhance the viability of timber plantation estates in key regions.



Focus area 5: Community education

In Queensland, commercial timber plantations on private land are a relatively new and immature form of primary production compared to traditional industries such as horticulture, cropping, and grazing. The Queensland Government will work with timber plantation companies and other stakeholders to help improve community understanding and acceptance of the timber plantation sector in key regions.

Action 5.1

We will initiate and support research projects to provide robust information about the timber plantation sector and its social, economic and environmental benefits.

Action 5.2

We will work with industry to build collaborative relationships with key stakeholders such as local governments, the Local Government Association of Queensland, other land users and industries to identify actions to improve the understanding of the timber plantation sector in key regional communities.

Action 5.3

We will regularly communicate the economic, social and environmental benefits of sustainable, well-managed timber plantations.

