

Item	Title
1	<u>Welcome & Competitions Act</u>
2	<u>Current Supply Position</u> <ul style="list-style-type: none">- Reiterated the points made by Noble Francis at the Timber Development UK Global Market Conference. Included in the CPA's presentation is the Autumn construction forecast while this is a downgrade since the summer it still represents significant growth for 2022 . The full presentation from the CPA can be found on the TTF website.- UK / Europe<ul style="list-style-type: none">•MDF production still outstripped by demand.•OSB started to slow in September – UK particularly bad. Similar to softwood, forecasts looking good for Q1.•Good birch supply availability however varies between quality level. Logistics remains an issue.•Some members reported there was an appetite to turn stock into cash rather than hold it – this is creating mixed market messages. Although there are few if any indications that panel product supply will improve significantly in first half of 2022.•There is a sporadic pattern of shipments caused by the switch from containers to breakbulk. Ports like Tilbury go from being empty to very busy in a short period.•Haulage costs continue to cause problems.•UK lacks breakbulk capacity following limited specific breakbulk port funding over the years.- Brazil<ul style="list-style-type: none">•Freight appears to be getting worse in Brazil. High prices which are expected to rise into January which is impacting cost.•America is buying large quantities CDX which is putting pressure on supply.

- Prices expected to rise rapidly in 2022 because of large US demand. Similar pattern to 2021 expected.
- Brazil log supply is difficult due to generally high global demand.

- Indonesia/Malaysia

- Malaysian freight continues to be an issue. Lack of vessels and energy costs will increase prices in 2022.
- There is an intermittent trend of Malaysian and Indonesian timber caused by the shortage of containers and the need to revert to break bulk. Often with no shipments for months at a time.
- Indonesian freight rates still very high. Feeder vessels and release of stock from quay is an issue.
- Log availability has proved particularly difficult in this region. Bad rainy season, covid difficulties and labour shortages have created supply and demand imbalances.

- China

- Costs continuing to increase because of energy, labour and shipping costs. Prices expected to increase further in 2022.
- Plenty of poplar however reports of limited FSC poplar.
- Not a lot of available stock from China currently and the supply is unlikely to improve as we head into Chinese new year (1st Feb).
- China is very strict with Covid measures which may be reducing capacity.
- Winter Olympics may have an impact on Plywood capacity as China looks to improve pollution levels via early closures of mills ahead of Chinese new year.

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Technical and Trade

- UK Customs changes coming into place 1st Jan 2022

- Not expected to have much impact on the timber trade.
- Plant health changes refer to plants rather than wood products.

- Coniferous Plywood Quota

- This will be in place 1st Jan 2022
- Same volume as last year – 167,000m³

- EU Trade / Rules of Origin issues encountered

- Members reported that the Rules of Origin seems to be working well.
- FLEGT licensing is proving difficult if transferring tropical timber to UK via EU.
- Some members having issue with country-of-origin certificates.

- Transition from CE to UKCA marking

- Not much to update. Position is straightforward for panel products.
- Members are encouraged to make this switch as soon as possible.
- Comes into force 1st Jan 2023
- Members can read more on UKCA marking [here](#).

- Update on work with CNFPIA

- Xiao will be participating in a CNFPIA internal audit on her visit to China. This looks at legality and product performance of Chinese plywood exported to the UK.

TTF Action

- We will investigate issues with country-of-origin certificates that members are having issues with.

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TDUK Update

- Merger: what do you want to see for panels?

- Members wanted to see publications on specific FR wood products.
- Members wanted to see a brief, general purpose publication to bridge the link between merchant and builder. This would focus on the end use of products.
- Specification table has proved popular and useful among members. There were calls to expand it to more products.
- Need a clear differentiation between members and non-members to prevent industry free riding.

- CCPI/Building Safer Future Charter

- Urge members to ensure they can back up evidence and performance of their product to adhere to CCPI regulations.
- Competence among employees is also important for CCPI.
- CCPI impacts FR products the most.
- Access the [TTF CCPI website](#) here for more information

- Education and Skills

- TTF are undergoing a partnership with Edinburgh Napier University and NMITE as we look to improve skills of future professionals.
- There were discussions on how we can make the timber industry more attractive for young professionals.

TTF Action

- We will send previous copies of our FR wood products publications and ask members what

else they would like to see.

- We will circulate an editorial structure / outline and a marketing plan to members and ask for feedback.
- Timber Development UK will look to refresh old messages on code of conduct, trusted timber, RPP etc. following official launch in 2022.

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Dates for next meeting

- 24 February
- 9 June
- 8 September
- 8 December

Attendees

Name	Company
Jack Clappen	Timber Trade Federation
Mark Giles	Altripan Ltd
Xiao Ma	Timber Trade Federation
Stuart McKelvie	Caledonian Plywood Company Ltd
Mark Cheriton	MDM Timber Ltd
Nick Boulton	Timber Trade Federation
Martyn Fowkes	National Timber Group
Joe Walshe	Hanson Plywood Ltd
Joan Bailey	UPM
Steve Frommont	James Latham
Gary Holburn	Graeme Holburn & Co
David Hopkins	Timber Trade Federation
Eddy Nichol	Metsa Wood
Malika Eatmani	Price & Pierce Forest Products
George Watson	Meditate Smartply

Apologies

Name	Company
Simon Fleet	W. Howard Ltd
Ian Attwood	International Plywood
Richard Lazenby	Falcon Panel Products
Richard Fatkin	International Plywood