

ITEM: 9
APPENDIX A

**DRAFT MORAY
WOODLAND &
FORESTRY STRATEGY**

JANUARY 2017



moray
council



33%

Forest cover
in Moray

62,441

Hectares of
Forest
in Moray



INTRODUCTION

Woodlands and forests are important to Moray. They support the local economy through timber production, sawmilling and tree nurseries and provide a high quality landscape setting that makes Moray a distinctive and unique place to live and visit. There are many recreational and educational opportunities within our woodlands that contribute to the health and wellbeing of our communities.

Moray has a high percentage of forestry cover at 33% of the total land area compared to the national average of 18%. The forested area of Moray is approximately 62,441 hectares.

PURPOSE OF THE STRATEGY

The purpose of the strategy is to identify the key issues affecting forestry and woodlands in Moray, highlight the opportunities that exist across the sector, increase the profile of current activities and guide woodland creation to appropriate locations across Moray over the next 20 years.

The strategy is wide ranging and covers a variety of different forestry and woodland interests and is intended to provide a framework for the delivery of Scottish Government priorities, including sustainable economic development, climate change and woodland creation.

The following diagram sets out the policy framework for the preparation of the draft strategy.





STATUS OF THE STRATEGY

The strategy will become supplementary guidance and will support PP1 – Sustainable Economic Development. This policy seeks to diversify the economy and create high quality jobs. The strategy highlights opportunities within the forestry and woodland sectors that the Moray Council would be supportive of in principle.

The strategy also supports PP2 – Climate Change and the role of woodlands in adapting to and mitigating the impacts of climate change.

Spatial mapping identifies preferred areas for new woodland creation which will be used to target grant support with preferred areas receiving a grant support uplift.



VISION

The draft strategy is framed around a 20 year vision of growth for our forests and woodlands as follows.

Moray has a network of multi-benefit sustainably managed woodlands that produce high quality timber to support jobs, attract visitors, provide educational and recreational opportunities and contribute to the health and wellbeing of our communities.

The following aims have been developed to deliver the vision.

HARNESSING THE POTENTIAL OF OUR WOODLANDS

CONNECTING PEOPLE AND COMMUNITIES TO OUR WOODLANDS

PROTECTING AND ENHANCING OUR WOODLANDS



KEY THEMES

The key issues for the draft strategy were developed following consultation with a variety of forestry stakeholders. Due to the wide ranging interests across the forestry sector it is recognised that partnership is fundamental to achieving the vision within the strategy. The identified themes have been brought together to show the connections between the different aspects of forestry and woodlands.

The key issues have been grouped and developed into key themes to provide a framework for the strategy.



HARNESSING THE POTENTIAL OF OUR WOODLANDS

- Economic development
- Timber transport
- Education, training and skills
- Tourism, recreation and access

CONNECTING PEOPLE AND COMMUNITIES TO OUR WOODLANDS

- Health and wellbeing
- Community ownership

PROTECTING AND ENHANCING OUR WOODLANDS

- Environmental quality of woodlands
- Opportunities for new woodland creation



HARNESSING THE POTENTIAL OF OUR WOODLANDS

ECONOMIC DEVELOPMENT

Moray’s diverse and distinctive forest and woodland resource offers significant potential to attract investment and support employment. The strategy aims to derive the greatest economic benefit from the existing and future resource.

Economic Importance of Timber

- Recognise the contribution of the forestry sector to the local economy.



Forestry is a major sector within the Moray economy and contributes significantly to sustainable economic growth.

Annually within Moray, direct forestry related employment of Moray residents has been estimated at 630 Full Time Equivalents (FTEs). Including the wider supply chain and impacts from employee spending this total would rise to 820 FTEs. £32 million of associated Gross Value Added (GVA) would have been generated, of which approximately £20 million will have been gross earnings for Moray residents.

The following table provides a breakdown of direct employment:



	FTEs
Nurseries, Planting, Management, Harvesting	200
Primary & Secondary Processing, Biomass Plants, Production of Woodchips, Pellets & Firewood	250
Haulage	40
Other Employment (including forest owners and maintenance)	90
Tourism-related	50
	630



Employment in Forestry in Moray

The earnings associated with forestry related employment generated in Moray vary across activities, there are a number of jobs where employees are well paid compared with relatively low Moray average, i.e. in harvesting, processing and haulage as well as management.

Employment in activities such as planting and nurseries is less well paid, and employers can be dependent upon migrant workers, especially for seasonal work.

There are six large tree nurseries in the UK. Due to good soil conditions two of these are located within Moray. Christies Elite and Christies of Fochabers are nationally important tree nurseries; of the 40 million trees produced per year in the UK these two companies are responsible for growing half of them.

James Jones are major employers in Moray. Their Mosstodloch sawmill provides a range of product, including fencing and pallets and construction timber for local and national markets. In Forres the company design and manufacture high value engineered wood products for the house building market.

In addition to this there is employment associated with the ongoing management of public and privately owned forests across Moray, including fencing and access maintenance, thinning, felling and visitor provision.



Economic Opportunities in Moray

In developing the forestry industry in Moray the strategy focuses on the following opportunity areas.

Woodland Planting

- Promote high quality timber production in Moray
- Promote the planting of a wide range of coniferous species to help to diversify and expand the timber market



With replanting a condition of a felling license and high levels of felling in recent years and forthcoming years due to the maturity of the forests in Moray, planting and associated employment will continue to stay strong. It is projected that there will be a growing demand for timber in the longer term for use in buildings and amenity as well as renewable energy heating.

Future demand should be strengthened by planting a wide range of coniferous species in silvicultural mixes, e.g. Douglas Fir, Norway Spruce, Lawson Cypress, Western Red Cedar, Western Hemlock, Siberian Spruce and European Sliver Fir. Such diversification will help to increase resilience to pests and tree disease and give the Moray Nurseries opportunities to diversify the range of planting stock they can offer, both to Moray and wider markets. Through research and development markets for new products that resist or counter disease could also be gained.



Sustainable Construction

- Promote the use of locally grown timber in new buildings
- Encourage local timber processing

Timber is particularly suitable for the construction of new buildings and in particular emerging offsite construction methods. This improves the sustainability of the construction process and is in keeping with the drive for efficiency in the construction industry. There are specialist architects throughout the region who have developed considerable skill in utilising locally grown timber for this purpose. There is an opportunity to continue to develop demand for locally grown timber.



Wood Fuel Market

- Promote the expansion of local woodfuel markets
- Promote supply chain opportunities relating to woodfuel for small scale businesses

The promotion of woodfuel and biomass as a sustainable source of heating will continue to drive the demand for firewood, woodchip and wood pellets. The Renewable Heat Incentive (RHI) continues to be a driver in this market and will create opportunities for woodland owners as well as create employment related to supply chain opportunities.

TIMBER TRANSPORT

- Encourage increased collaboration between key sectors to explore funding options for road network improvements
- Promote a forward planning approach to identification of route improvements
- Support continued investment in techniques to reduce the impact of forest operations on the road network
- Promote local processing to reduce timber miles

The importance of the forestry industry and timber transport to the Moray economy is recognised, as is the requirement to maintain the road network to support both the industry and the local communities.

To maintain and improve the rural road network allowing for timber transport, while minimising disruption to local communities, as well as leisure and tourism will require a mix of funding options including the Scottish Government, Moray Council, the timber industry and landowners. All funding options should be explored with a co-ordinated approach adopted. This currently happens through the Grampian Timber Transport Group which has representation from the timber industry and local authority, this collaboration should be extended.



tyre technologies and logistics to minimise the impact on the local road network. With the Scottish Government commitment to extend forestry coverage and increase timber production, forward planning is required to identify route improvements to accommodate the increase in timber transport and reduce disruption to local communities, while increasing opportunities for leisure and tourism.

EDUCATION, TRAINING AND SKILLS

- Encourage the forestry sector to raise awareness of the variety of career opportunities in the industry

The forestry industry needs to attract new entrants into the sector as the current workforce is ageing and reducing in size. The employment opportunities within the sector should be highlighted and promoted as attractive career options. Skills Development Scotland (SDS) is currently developing a skills plan for the forestry sector, exploring the opportunities for shared apprenticeship models, career awareness, creation of a new ambassador's network and creation of new materials to promote modern apprenticeships.

The timber industry could encourage recruitment by working with local schools and higher education providers to highlight the opportunities in forestry, sawmilling, timber frame building, joinery and woodfuel. Forestry related courses are taught at the Scottish School of Forestry at Balloch.

TOURISM, RECREATION AND ACCESS

- Develop the quality and range of woodland tourism products to fit the changing needs of potential visitors seeking a wide range of high quality and value for money experiences.
- Promote an attractive, accessible woodland environment in which to stay, play and relax.
- Encourage tourism stakeholders in and around Moray's woodlands to work effectively, identifying opportunities for collaborative projects and initiatives which contribute to a better tourist experience
- Encourage woodland tourism businesses to sign up to relevant Visit Scotland Welcome schemes
- Support communities and stakeholders to develop and implement local tourism projects
- Encourage innovative approaches to managing and maintaining our woodlands' recreational infrastructure to sustain use and accessibility





DRAFT Moray Woodland & Forestry Strategy

In 2015 more than 700,000 tourists visited Moray, contributing more than £100m to the Moray economy. It is acknowledged that although they are well used, visits to our woodlands are predominantly by local visitors. This strategy recognises the important role our forests and woodlands make towards Moray's tourism economy. It seeks to support and enable continued development of our woodland tourism offer through partnerships, collaboration and empowering and encouraging communities, woodland owners, and other stakeholders. It is recognised that private landowner's have supported recreation, tourism and access by investing in maintaining their forests.



- **Develop the quality and range of woodland tourism products to fit the changing needs of potential visitors seeking a wide range of high quality and value for money experiences.**
- **Promote an attractive, accessible woodland environment in which to stay, play and relax.**
- **Encourage tourism stakeholders in and around Moray's woodlands to work effectively, identifying opportunities for collaborative projects and initiatives which contribute to a better tourist experience**

- **Encourage woodland tourism businesses to sign up to relevant Visit Scotland Welcome schemes**
- **Support communities and stakeholders to develop and implement local tourism projects**
- **Encourage innovative approaches to managing and maintaining our woodlands' recreational infrastructure to sustain use and accessibility**

The strategy recognises that collaborative working is key to the achievement of its aims, and to this end, new partnerships will be formed, developed and maintained with Moray Speyside Tourism and VisitScotland, with our tourism providers and with our private estates.

Accessibility

- Encourage Moray's woodland tourism businesses to implement accessibility and inclusion best practice
- Support, encourage and market initiatives which open up our woodlands to visitors with additional access needs, for example, the use of all-terrain buggies, widening of trails and installation of accessible signage

To provide a successful and sustainable tourism offer, Moray's woodlands should be accessible for visitors of all abilities. This includes people with permanent physical disabilities, families with young children and older travellers. All groups should be encouraged to enjoy Moray's woodlands by addressing potential barriers to access, and by promoting relevant experiences and opportunities.



Accommodation

- Encourage accommodation development and upgrading across Moray, in line with local planning strategy and policy
- Support development and expansion of existing accommodation provision
- Promote and encourage participation in VisitScotland's QA schemes
- Identify opportunities for further accommodation investment
- Support local providers to develop schemes such as glamping or forest huts

The provision of high-quality, affordable, varied accommodation options in and around Moray's woodlands is crucial to improving and developing tourism in Moray's woodlands.

Cycling

- Support the initiatives to develop and expand Moray's off-road trails, for example, at Glenlivet and Moray Monster Trails
- Support and encourage the development of off and on-road links in and around Fochabers and Keith.
- Encourage active travel connections between Moray's trails, and develop cycling links into the National Park via the Dava Way, Glen Avon, Tomintoul and Glenlivet
- Support initiatives to develop MTB trails and accommodation at the Cabrach
- Support the development and promotion of long distance cycle routes, i.e. Nairn to Cullen and the Moray Way
- Support the development of Culbin Forest as a key family cycling destination



The economic contribution from cycle tourism in Scotland is identified as ranging between £117.2 million and £239 million per year. When combined with mountain biking, the total value of cycle tourism in Scotland is estimated to be between £241 million and £362 million per year. Moray has a well-developed range of both off and on-road cycle trails to suit all ability levels and is well-placed to maximise the benefits from cycling, both within and between its forests and woodlands.

This strategy seeks to build on this strong foundation, support the development of existing infrastructure and identify opportunities to improve the cycling offer across Moray's woodlands, whether by improving trails within woodlands, or by supporting the development routes which link woodland locations.





Walking

- Support the development of a region-wide Walkers are Welcome initiative, designed to deliver an integrated high quality, tourism focused walking offer
- Support and encourage development and management of our Core Paths network, raising awareness and improving branding across the region
- Support and encourage development of walking routes around and between Moray's towns and villages, i.e. The Isla Way from Dufftown to Keith, the Fishwives Trail from Buckie to Keith and the development of a triangular long distance path linking Keith, Huntly and Dufftown
- Support and encourage efforts to improve walking links into the Cairngorms National Park
- Support and encourage the development of walking routes around the Moray Coastal Trail
- Establish and develop relationships with key stakeholders such as the Moray Way Association, encouraging cooperation focused on maximising the tourism benefits of the Dava Way, Speyside Way and Moray Way

Moray is home to an extensive range of walking routes; from established and well-known long distance routes such as the Moray Way incorporating parts of the Speyside, Moray Coast Trail and Dava Ways to shorter, local paths and connections. Walking is not only a growing segment of the tourism market, it is also of huge health benefit.

Active Woodlands

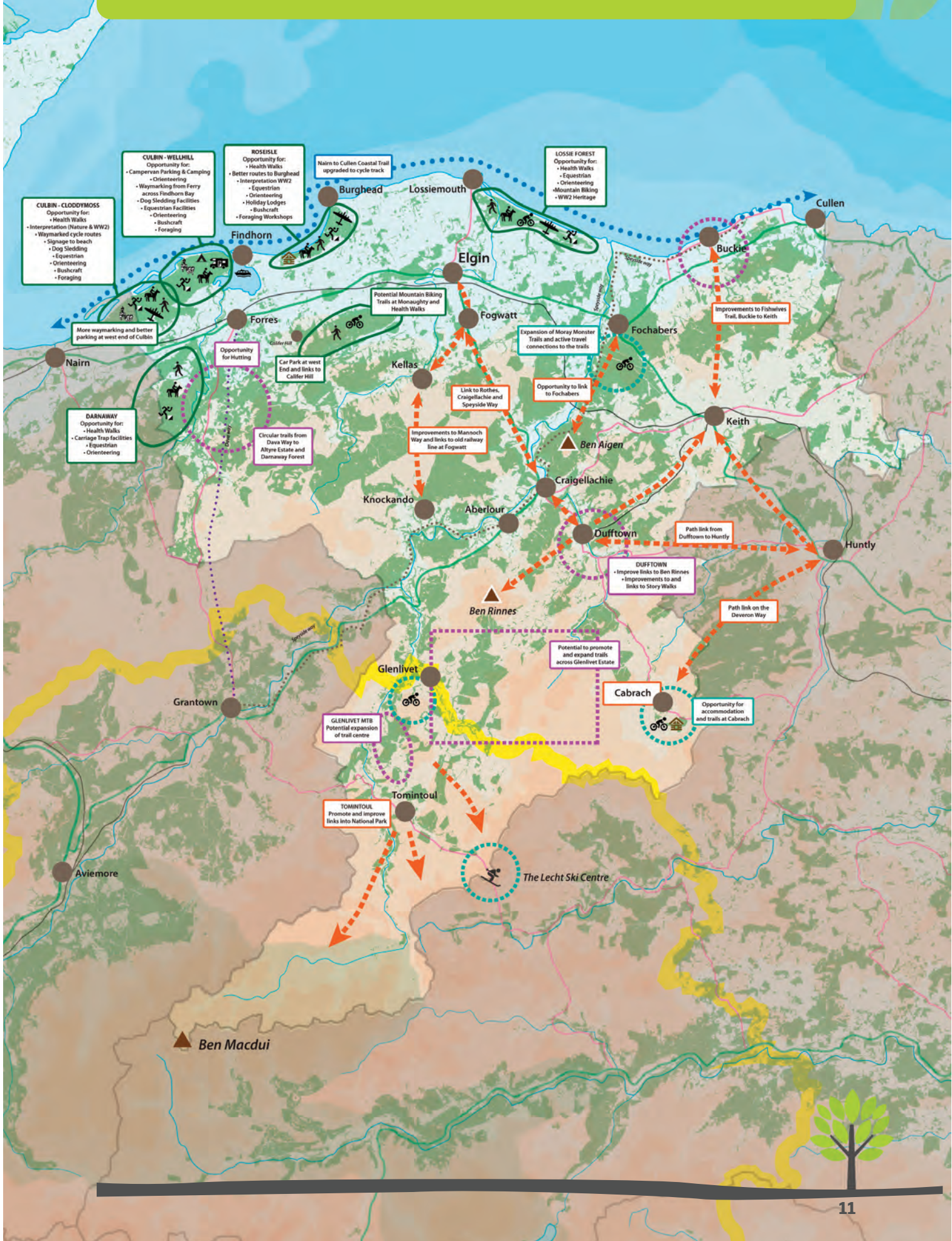
Moray's woodlands are not only the perfect location for walking and cycling; they have also hosted the World Orienteering Championships, National Enduro Championships and Scottish Rally Championship Speyside Stages and welcome sled dogs, trail runner, horse riders and 'geocachers'. The strategy recognises the diversity of leisure, tourism and recreation use of our woodlands and seeks to enable and encourage the widest range of users to enjoy our woodlands.



Mapping has been prepared setting out aspirations for the development of the tourism and recreation and access offer in Moray.



Moray Concept Map



CONNECTING PEOPLE & COMMUNITIES TO OUR WOODLANDS

HEALTH AND WELLBEING

- Encourage and promote the use of woodlands to improve health and wellbeing
- Encourage and promote the use of woodlands and forests for outdoor learning experiences
- Promote the creation of woodlands close to towns and villages
- Prepare masterplans and development briefs for development sites to secure woodland creation, green infrastructure and green networks



Forests and woodlands make a significant contribution to creating a high quality environment and provide opportunities to promote healthier lifestyles. Woodlands and forests are known to be good for mental and physical health and general wellbeing. There is a growing demand from a diverse range of groups including social enterprises utilising woodlands for leisure activities, learning opportunities and work related training. Enhancing accessibility to our woodlands offers the opportunity to encourage physical activity and encourage people to keep fit.

Woodlands can also be places to help reduce stress and anxiety. Trees and woodlands can make an important contribution to successful places. Incorporating trees and woodlands into new and existing places that link with existing habitat networks can provide a range of benefits for people.



COMMUNITY OWNERSHIP

- Encourage and promote community management and involvement in woodlands
- Encourage and promote community owned renewable energy projects in woodlands
- Encourage and promote an affordable housing pilot in Moray's woodlands

Community ownership of forests, encouraged by grant support from the Scottish Government, has been strongly supported by Highland and Islands Enterprise and other public bodies. There are already a number of community owned forests in Moray and a desire to create more. There are opportunities for communities to undertake employment generating projects, including affordable housing building using timber from their forests, creating small sawmills, hosting events in forests and harnessing renewable energy technologies



PROTECTING AND ENHANCING OUR WOODLANDS

ENVIRONMENTAL QUALITY OF WOODLANDS

Climate Change and Tree Disease

- Support new woodland creation that is resilient to the negative effects of climate change and tree disease by encouraging a greater diversity of tree species and management practices
- Promote the opportunities for trees and woodlands to assist in natural flood management
- Promote trees and woodlands as a means to mitigate climate change through carbon sequestration

Climate change means that the forestry sector is likely to be faced with warmer, wetter winters and warmer drier summers. These conditions mean that woodland and forest managers must be prepared to adapt to threats such as the increased prevalence of pests and tree disease.



Environmental Quality and Biodiversity

- Support the protection of existing woodland
- Promote woodland practices that protect and enhance environmental quality and biodiversity
- Support woodlands that restore, maintain and enhance biodiversity through the creation of habitat networks
- Encourage sustainable forest management that meets the UK Forestry Standard

Moray has a high proportion of woodland coverage and therefore woodlands are a key feature of the area's landscape character. Woodlands also provide a rich and diverse range of habitats for wildlife and have a role in conserving nationally important species.





OPPORTUNITIES FOR NEW WOODLAND CREATION

- Promote and increase the area of woodland cover in Moray
- Promote native woodland creation adjacent to existing native woodland.

Moray is already one of the most wooded areas in Scotland. There are still opportunities for appropriate woodland expansion and spatial mapping has been prepared to identify appropriate locations for new woodland planting.

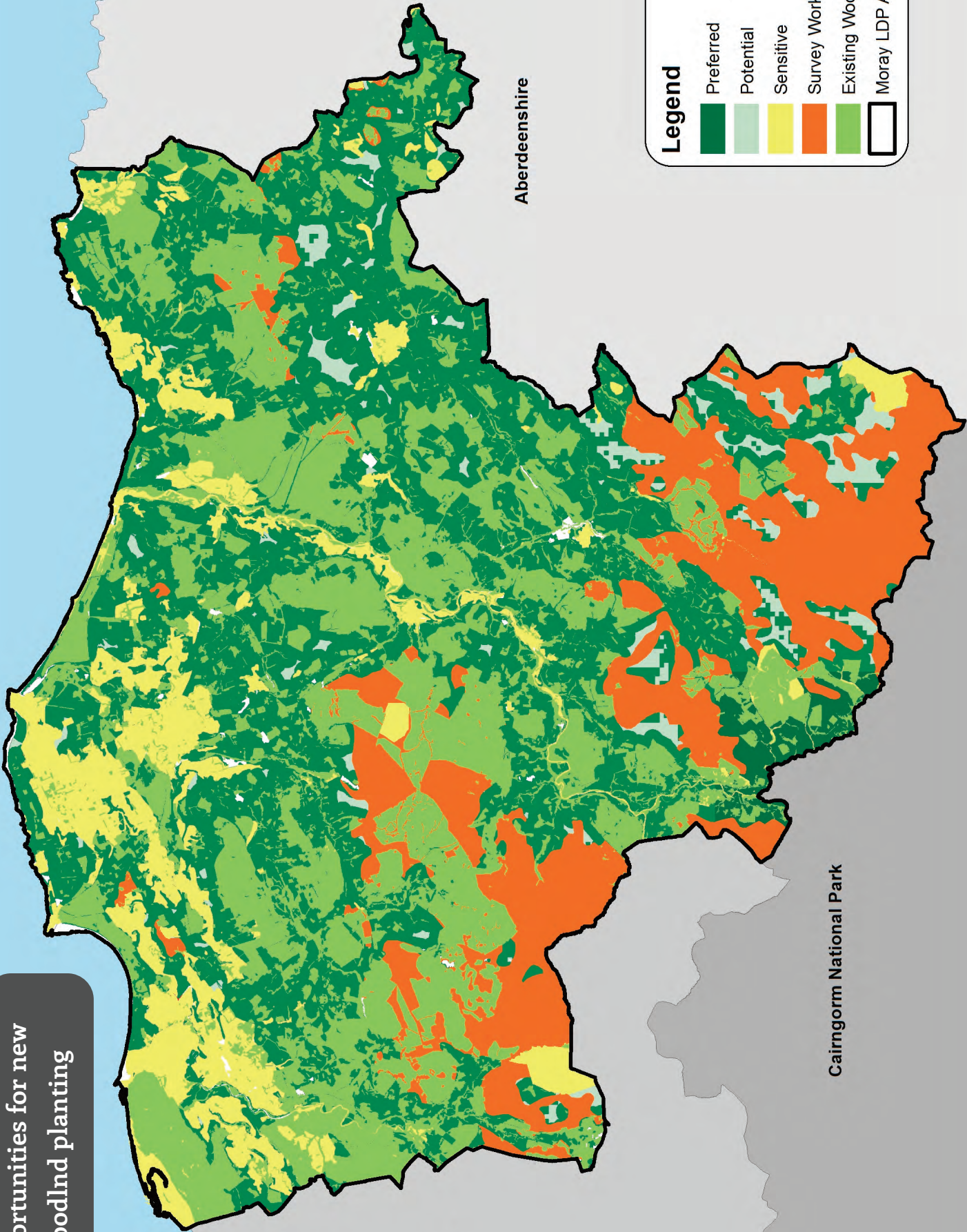
The mapping identifies preferred, potential, sensitive and areas unsuitable for new woodland planting and is at a strategic level and therefore the maps are indicative only. The strategy does not provide guidance on the types of forestry that should be planted; instead individual applications for tree planting will be assessed on their merits.

In order to achieve aspirations within the strategy in relation to woodland planting in and around towns, natural flood management and the creation of green networks modifiers have been developed. A 1 km buffer has been drawn around all identified settlements, a 500m buffer around existing woodlands that upgrades class 3.2 land and above from potential to preferred status. The upgrade of class 3.2 land and above from potential to preferred has also been applied to areas identified as offering opportunities for natural flood management.

The methodology supporting opportunities for new woodland planting mapping is set out in Appendix 1.



Opportunities for new
woodland planting



Aberdeenshire

Highland

Cairngorm National Park

Legend

- Preferred
- Potential
- Sensitive
- Survey Work Required
- Existing Woodland
- Moray LDP Area

Constraint Type	Information Layer	How used in map
Existing Woodland	National Forest Inventory Scotland 2014	Existing woodland – out with analysis for new woodland creation
	Native Woodland Survey of Scotland	
Agriculture Land	Land Capability for Agriculture (1:50 000) Class 3.2 and above	Potential but can be upgraded to Preferred by opportunity layers
	Land Capability for Agriculture (1:50 000) Class 1, 2 and 3.1	Sensitive
Urban area and proposed development	Housing Allocations from Moray Local Development Plan 2015	
	Settlement Boundaries from Moray Local Development Plan 2015	
Cultural Heritage	Scheduled Monuments (with 20m buffer)	
	Battlefields	
	Gardens and Designed Landscapes	
Natural Heritage	Local Nature Reserves	
	National Nature Reserves	
	Wetlands of International Importance (RAMSAR)	
	Special Areas of Conservation	
	Special Protection Areas	
Carbon Rich Soils	Carbon Rich Soils (Categories 5 and 6)	Survey Work Required

Opportunity Type	Information Layer	How used in map
Adjacent to settlements	1km buffer around settlements identified in the Moray Local Development Plan 2015	Upgrades class 3.2 and above land to preferred due to benefits
Woodland habitat networks	500m buffer around existing woodland	Upgrades class 3.2 and above land to preferred due to benefits
Natural Flood Management	SEPA Natural Flood Management opportunities for run-off reduction (medium and high potential)	Upgrades class 3.2 and above land to preferred due to benefits
	SEPA Natural Flood Management opportunities for floodplain storage (medium and high potential)	Upgrades class 3.2 and above land to preferred due to benefits





Moray Woodland Strategy



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