The South East Forestry Hub's

Smallholder Forestry Study

SEFH-2023-014

A study of Landholders and Forest Service Providers in the Bega Valley LGA.

Ben Buggy, Lisa Chin and Trina Day

November 2025

SEAN
South East Agroforestry Network

A study of Landholders and Forest Service Providers in the Bega Valley LGA.

Identifying barriers and opportunities faced by landholders engaging in forestry activities, as well as commercial operators providing Forestry related services.

Conducted by the South East Agroforestry Network (SEAN) on behalf of the South East Forestry Hub (SEFH).

Acknowledgment of funding

This report was commissioned by the South-East Regional Forestry Hub Inc. with funding from the Australian Government, Department of Agriculture, Fisheries and Forestry.

Document Control

Project:	SEFH-2023-014 - Smallholder Forestry Study
Report:	Smallholder Forestry Study
Version:	Final Report v1.3
Date Submitted:	November 26, 2025
Review:	Reviewed by SE NSW Forestry Hub. Approved by Rob de Fegely

0.1 Executive Summary

The Smallholder Forestry Study, conducted by the South East Agroforestry Network (SEAN) for the South East Forestry Hub (SEFH), confirms there is significant interest and active engagement in small-scale forestry among landholders in the Bega Valley LGA.

However, the study reveals that the sector is limited by structural, economic, and practical barriers that make long-term investment in forestry feel unsupported.

Barriers

The research highlighted critical issues for both Landholders and commercial Forestry Service Providers (FSPs):

- Policy and regulatory uncertainty: Landholders feel exposed to the risk of future policy changes, such as a possible ban on native forestry, which creates a strong disincentive for planting trees or managing native forest.

  The RU2 zoning restriction in the Bega Valley LGA specifically prohibits forestry without development consent, while Threatened Species Regulations create a perception that improving biodiversity is a "risky endeavour".

- Market and Supply insecurity: Landholders lack clarity on commercial pathways, sale logistics, and the reliability of financial returns.

  FSPs struggle with a limited local supply of durable hardwood sawlogs, caused by a history of high-grading, and the impact of the 2019/20 bushfires. Local millers are undercut by the export of raw hardwood sawlogs.

- Knowledge gaps: There is a significant preference among smallholders for practical, hands-on learning (field days/site visits) over digital resources which highlights the need for locally relevant, actionable knowledge. Small growers cannot afford the expertise required for services like forest management plans.

Recommendations

Based on these findings, supporting the smallholder-based forestry industry in the South East requires a coordinated effort across three strategic areas:

Policy and Regulatory Reform

1. Establish long-term certainty: Offer government-backed assurances of long-term harvesting rights for registered PNFs and new plantations, to overcome the risk of policy reversal.

2. Remove zoning barriers: Prioritise working with the Bega Valley Shire Council to amend the Local Environmental Plan (LEP) to simplify or permit forestry activities within the RU2 zone.

3. Investigate log exports: Conduct an investigation into the export of raw hardwood logs, focusing on incentives for local processing.

4. Reform Threatened Species Regulations: Review the application of Threatened Species Regulations to ensure they incentivise, rather than penalise, proactive management that encourages biodiversity and forest health.

Practical, Collaborative Support

5. Deliver hands-on training: Implement training programs for smallholders via field days and site visits, focusing on silviculture (like pruning and thinning), plantation establishment, and linking them with harvesters and millers.

6. Improve access to knowledge: Consolidate complex guidance into simple, readily accessible resources, such as a ‘one-pager’ with when to prune, thin and growth rates.

7. Address disadvantage for Small Growers: Recognise that smaller growers are at a disadvantage; support mechanisms must overcome the high costs for forestry expertise.

8. Peer-to-peer networks: Foster strong, local networks and informal gatherings where smallholders can learn directly from successful models.

9. Collaborative Financial Models: Reducing the upfront costs for plantation establishment through collaborative investment models.

Market Development and Advocacy

10. Improve market transparency: Work to increase transparency of log prices so that growers can more easily understand and access the commercial market.

11. R&D of local processing: Support innovation to develop new markets and uses for local low-grade timber and forestry residue (like bio-char and biofuels), addressing the resource quality issue from low grade forests.

12. Advocacy campaign: Implement a fact-based public relations campaign to proactively educate the public about the positive outcomes of domestic timber production.

13. PNF certification: Investigate a regional certification scheme for PNF timber to help secure local supply and improve public perception.

Contents

1.0 Introduction

This report presents the findings of the Smallholder Forestry Study, an assessment commissioned by the South East Forestry Hub (SEFH) and conducted by the South East Agroforestry Network (SEAN). The study was initiated as part of the SEFH's mandate to undertake an assessment of the factors impacting the forestry production and processing sectors within its region, in alignment with the Australian Government's "Growing A Better Australia—A Billion Trees for Jobs and Growth".

The main goal of this research was to identify key opportunities and barriers faced by two main stakeholder groups in the Bega Valley Local Government Area (LGA): landholders who engage in forestry activities (with a specific focus on smallholders managing properties less than 30 hectares) as well as commercial operators in the region providing forestry-related services.

The data presented has been collected, and analysed to provide the SEFH with a clear overview of the regional landscape, enabling the best support for local growers and commercial operators in building a more productive and sustainable forest industry.

1.1 Background & Scope

The South East Forestry Hub

The South East Forestry Hub (SEFH) was established following the Australian Government's National Forest Industries Plan 2018, to create 11 regional Forestry Hubs across the nation. These hubs are designed to represent key timber growing and processing regions, working collaboratively with industry, government, and the community.

The central aim of the SEFH is to assess the production forestry resources, processing capacity, and infrastructure needs and limitations within its region. This study directly supports that aim by providing feedback to the Commonwealth about the on-farm challenges of small-scale growers, as well as the local service FSP network within the South East region of NSW.

The Smallholder Forestry Study

SEFH engaged the South East Agroforestry Network (SEAN) to conduct this study, focusing the scope on two main target groups:

1. Landholders (Smallholders): The research prioritised landholdings of less than 30 hectares to capture the opportunities and constraints facing this group. The objective was to gauge interest in, experience with, and barriers to undertaking plantation forestry and Private Native Forestry (PNF) activities on their properties.
2. Forestry Service Providers: This group includes key commercial operators such as timber millers, arborists, and production nurseries, with the aim of understanding their capacity, local demand environment, and the challenges they face.

The Bega Valley LGA was selected as the geographic focus for this initial study. The findings are intended to inform broader SEFH strategies applicable across the entire South East region.

1.2 Methodology

The Smallholder Forestry Study employed a mixed-methodology approach combining quantitative and qualitative surveys to gather comprehensive data as well as deeper insights. The surveys were conducted in 2025 and comprised three distinct components:

1. Quantitative Survey (Online Landholder Survey): An online and paper-based questionnaire designed to gather statistical data across four main areas: property information (e.g. size and zoning), forest management and goals, sources of information, and respondent demographics.

2. Qualitative Landholder Interviews: In-depth, semi-structured interviews were conducted with a sample of landholders who participated in the initial quantitative survey. This phase was designed to qualify the survey responses, provide nuance, and explore more personal perceptions.

3. Qualitative Forestry Service Provider (FSP) Interviews: A series of open-ended, in-depth interviews were conducted with commercial FSPs in the Bega Valley LGA. This focused on supply and demand issues, political challenges, operational constraints, and opportunities for growth.

1.3 Background Research

A number of reports have influenced the design of this Smallholder Forestry Study. The References section of this report includes a list of background reading. Below is a short summary of the most relevant studies.

In 2024, Southern Cross University published a report called 'Landholder barriers and incentives to timber production in northeast New South Wales' by Mia Cassidy and Graeme Palmer for the North-East NSW Forestry Hub. The methodology of this study also began with a quantitative survey and was followed up by in-depth interviews with landholders. The results of this study found that the primary barriers to timber production on farms were Cost, Land Use Conflict, Knowledge and Time. The conclusion of this report suggested that re-casting timber plantations as complementary to farm activities and income was paramount to the success of timber production on private land. The report suggested that future policy needs to provide economic and educational incentives to motivate landholders.

In 2017, the University of Canberra published a report called 'Private native forestry owner attitudinal study - Northern NSW' by Dr Lain Dare, Dr Jacki Schirmer and Mel Mylek for the Department of Primary Industries. This report looked at landholders who were managing 25 hectares or more native forest that is potentially able to be used for timber harvest. This report identified 7 barriers to landholders selling timber from their property, 6 of which related to challenges of meeting regulatory requirements and/or interacting with local state or government.

Our background reading included two reports that documented tree planting trials in southern NSW. 'Tree establishment on farms in south east NSW' by Louise Maud, 2008 and 'Assessment of farm forestry trials established in the Bega Valley 1994 - 2008' by David Newell, 2023. These reports emphasise the importance of supporting the ongoing management of forests rather than a focus on planting.

This Smallholder Forestry Study offers a unique perspective because we have:

- Focussed our study on smallholders (less than 30 ha).
- Employed both quantitative and qualitative studies.
- Included Forestry Service Providers, to provide a complete picture.

1.4 Limitations

Online Survey Participants

The study was limited by the number of participants of the online survey. Other studies (see in References - *Landholder barriers and incentives to timber production in north east New South Wales*) have noted the difficulty in gathering respondents through an online survey. Attempts were made, with some success, to engage participants in person at the Bega Sale Yards, and through other SEAN activities such as the Digital Mapping workshop (July 2025).

Landholders Interviewed

Due to the limited number of people who completed the online survey, the face to face/telephone interviews with landholders were taken from a limited pool. In order to overcome this limitation, attention was given to targeting a wide range of respondents for the in-depth interviews, to round out the Forester Profile information.

Forestry Service Providers Interviewed

The study was designed to focus on the Bega Valley, where there is a limited number of FSPs operating. Expanding the area covered to include more of the SEFH area would increase the number and diversity of FSPs interviewed.

1.5 Acknowledgements

The work of this Smallholder Forestry Study would not have been possible without the support of numerous organisations and individuals.

The South East Forestry Hub (SEFH) is acknowledged for commissioning this study, with funding from the Australian Government, Department of Agriculture, Fisheries and Forestry. We thank the SEFH management team for their guidance, feedback, and commitment to addressing the long-term sustainability of our regional forestry industry.

We also thank the landholders and Forestry Service Providers across the Bega Valley LGA who volunteered their time and shared their experiences to prepare this report.

2.0 Quantitative Survey: Online Landholder Survey

2.1 Introduction

The survey was published on the SurveyMonkey platform online, as well as in print format, from mid-March to mid-June in 2025. The goal of the survey was to gather quantitative data in four main areas:

- Property information including property size and zoning
- Forest management such as how landholders manage forested areas
- Information sources identifying how and where landholders access information
- Demographic information including age, education and income.

As an encouragement to participate in the survey, respondents had the option to enter into a draw for one of three $100 vouchers at a local production nursery.

To increase the likelihood that surveys were completed, no survey questions were compulsory. The average time it took respondents to complete the survey was 12 minutes.

The questionnaire was approved by the SEFH management team to ensure the survey aligned with the Hub's objectives.

See Appendix A for a copy of the Smallholder Forestry Survey.

2.2 Methodology

The questionnaire was available to complete online via the SurveyMonkey platform and digital and print promotion of the survey included a link to access the survey. Radio promotion of the survey directed listeners to the SEAN Facebook page where a link to the survey was pinned at the top. A print version of the questionnaire was also made available although only one person submitted a written response.

The survey opened on the 17th March 2025 and closed on 14th June 2025.

Survey recruitment took place via:

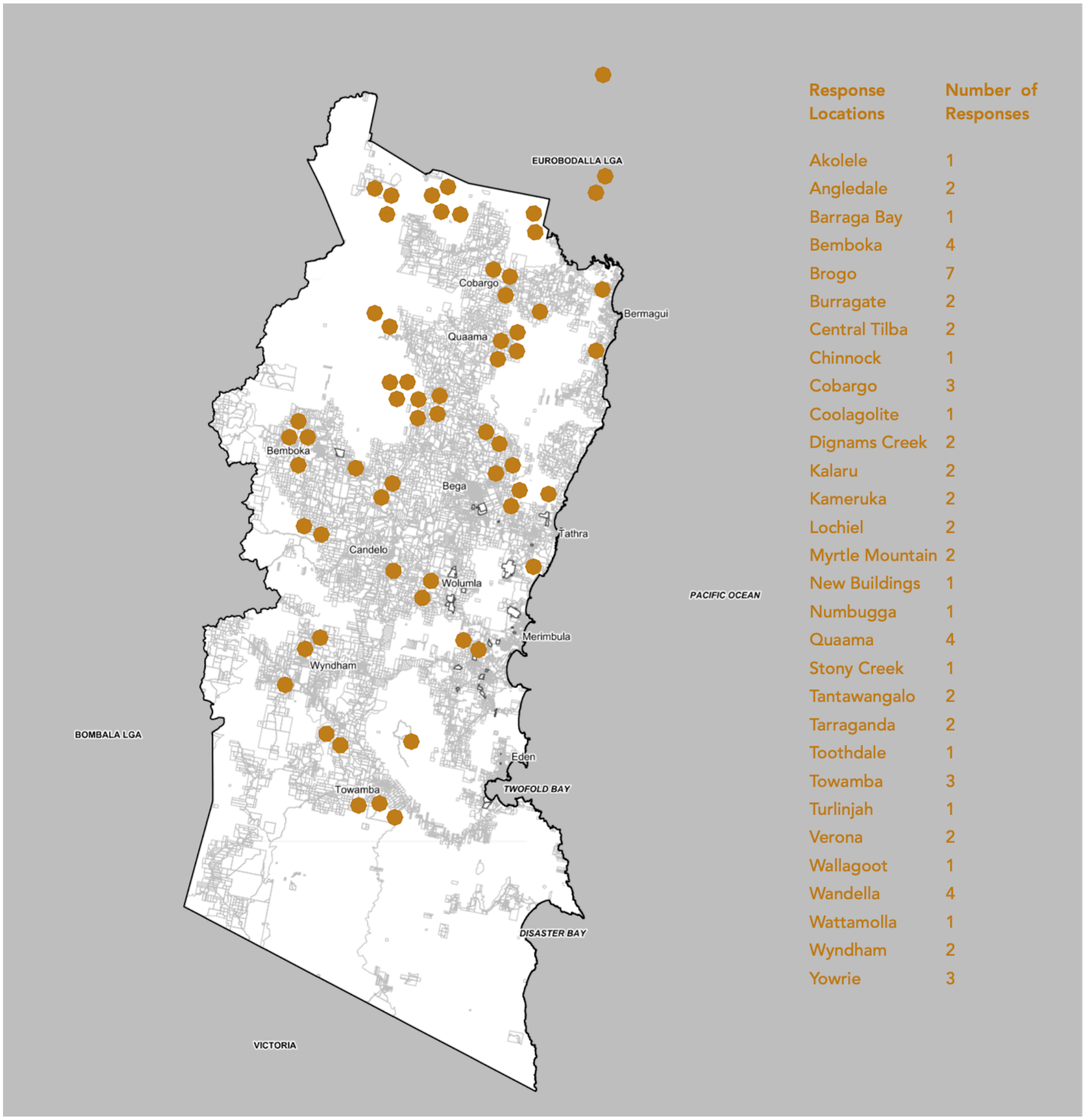
- Mailing lists (SEAN, SCPA - South East Producers and others)
- Local Facebook groups
- SEAN Facebook page
- Radio advertising - Edge FM Bega
- Print advertising - Bega District News
- A physical presence at local events such as:
    - Bega Saleyards
    - Workshops by LLS, SEAN and the South Coast Landcare Association.

A total of 63 responses were recorded and 92% of respondents completed the survey with only 5 surveys listed as incomplete.

The majority of responses related to land managed within the Bega Valley with 4 responses (6%) from outside of the Bega Valley LGA; those responses were from landholders within the wider SEFH area.

Responses from land managers related to a total of 5250ha. Responses ranged from less than a hectare to 1215ha. The land area managed by respondents covers 2.4% of the approximate 213,503 hectares privately managed in the Bega Valley.

Note that percentages in this section have been rounded to the nearest whole percent.



Map 1 - Bega LGA showing property locations of 63 respondents.

2.3 Results

Generally, respondents to the survey were land managers who:

- Owned and lived on the property they referred to in their responses
- Were on land zoned either RU1 or RU2
- Were involved with at least one local forestry/environmental group
- Had an interest in conservation and biodiversity
- Were keen to learn more about forestry management techniques
- Preferred field days, site visits and in person training than online delivery and digital resources

See section Appendix D - Full Results of Quantitative Survey for more detailed data of survey responses.

Property Information

Property Area

All respondents barr one answered the question about land size with an average of 83 ha. and a median of 40 ha.

Land zoning

All respondents answered the question about zoning although 6 participants (10%) were unaware of how their land is zoned. Fifty of the respondents, (79%) manage land zoned as primary production (RU1) and rural landscape (RU2). Of those who indicated another zone type, two were in RU5 (village use) while the remaining four had mixed zoning that included C2 (environmental conservation), C3 (environmental management), and RU4 (primary production small lots).

Land Use

The main land use types indicated were grazing, by 22 respondents (35%), and lifestyle (37%) however grazing properties were typically larger than others accounting for a total of 3565 ha of land while the next largest land use area was lifestyle with a total of 1051 ha. Five respondents felt unable to specify a single land use and chose Other, then specified a combination of residential and other uses.

Forests

Respondents were asked to indicate the approximate percentages of their land that was forest, agricultural or other and then give a rough breakdown of forested areas into forest age/type. The average proportion of forest differed according to the main land use specified, however there was also a wide range of responses for each land use group.

People who indicated that their main land use was conservation had a high proportion of forest (average 96.6%) while those who indicated lifestyle had less forest (average 45%) and those who mainly conduct grazing had a lower percentage (average 30%).

Forest Health

The survey asked respondents to indicate if they have noticed any indicators of stress or damage in their forests. Fire damage was the most common response. Of the nine responses for Other, three listed overcrowding as an issue.

During the Black Summer bushfires of 2019/20, 365,000 ha. of land (58% of the total land mass) was burnt in the Bega Valley and the survey aimed at capturing it's impact. Although two respondents (3%) indicated they had conducted prescribed burns, other responses were a fairly even split between low and high intensity bushfires from 30 respondents (48%) and 'no fire in the past 10 years' (54%).

People were also asked to indicate when the fire had impacted their forests in the past decade and of the 24 responses to that question, only 2 were not related to Black Summer.

Forest Management

The survey included questions about forest management goals, practices and experience. All respondents answered the relevant questions in this section giving an indication of high level engagement with their forests.

We wanted to know if people had actively managed their forests in the past 3 years and 46 (73%) indicated they had. Those engaged in forest management activities were most likely to undertake pest and weed management followed by pruning and thinning and timber harvesting for their own use.

We also wanted to get an understanding of why people are growing and managing their forests, which returned of intentions. Soil, water and biodiversity conservation was a high priority for respondents with 58 responses (92%). Although only 26 respondents (41%) indicated that commercial timber production was of interest, a further 4 respondents answered 'Other' and indicated that small-scale timber production was of interest.

When specifying ‘Other’ activities, exclusion fencing, erosion control, slowing water, seed collection and site preparation for planting were listed.

Of the 46 respondents who undertook forest management activities, 41 of these (89%) had completed the majority of their forest management activities themselves; those that didn’t undertake the work themselves engaged contractors. Respondents had varying levels of forest management experiences.

24 respondents (38% of those surveyed) had engaged in any harvesting activities in the last 3 years. Activities listed were personal use included using mulch from thinnings, firewood for their household, harvesting fodder trees for livestock, harvesting timber for onsite use and burnt tree removal.

Private Native Forestry

Two questions were asked of respondents regarding the Private Native Forestry program through LLS. Respondents were asked whether they had a PNF plan, and if not, would they be interested in establishing a PNF plan. Of the 54 people who responded to the first question, only 5 had a PNF plan. In relation to establishing a PNF plan, 47 people responded of which 15 said they would be interested and 24 weren't sure.

Information Sources

Section 3 of the survey was designed to identify where landholders are looking for information, and how valuable they find these resources.

Biodiversity credit schemes, monitoring native flora and fauna along with planting and silviculture were the topics where people wanted more information.

Field days, site visits and face to face training for the most preferred delivery methods for accessing information..

Existing Groups

Respondents were asked about existing involvement with local forestry/environmental groups. Responses were fairly evenly spread across the 5 groups listed: South East Forestry Hub, Landcare, South East Agroforestry Network, SCPA - South East Producers Bega Circular Valley.

2.4 Forester Profiles

Based on trends noted in the survey three distinct Forester Profiles developed, based on their answers to a range of the survey questions.

See Table 1 for a comparison of Forester Profiles.

Active Forest Users

This profile is characterised by landholders harvesting trees for personal use (89% of respondents) and conducting pest and weed management activities (78% of respondents).

Harvesting trees for commercial use, planting & regeneration and enhancing habitat were equally represented as current activities (56% of this group).

Active Forest Users had usually earned an income from forestry in the past 3 years, but didn't have clear goals for commercial activities in the future.

Represented by 9 respondents (or 14%) their responses suggested that this could benefit from practical face-to-face support, such as field days and site visits, that:

- Help them connect with with harvesters and millers
- Improve their understanding of timber markets and how to access them
- Build on their existing knowledge to improve their forestry management skills with a focus on producing high quality saw logs.

Aspiring Foresters

This group was interested in commercial production but had less experience of forestry than Active Forest Users.

The most common forest management activities this group had undertaken were managing forests (e.g. pruning and thinning) and harvesting trees for personal use (77% and 69% of respondents respectively).

Pest and weed management was the third most common activity (62%) followed by planting and regeneration (54%).

This was a larger sub-group than the 'Active Forest Users' - 13 respondents (or 21%).

Responses from landholders suggested that this profile type could benefit from support that:

- Clarifies rules around harvestable areas
- Increases knowledge & understanding of harvesting processes
- Focuses on multi-use opportunities within forests such as seed collection, tourism and conservation activities.

Ambivalent Forest Owners

Ambivalent foresters demonstrated an interest in forest health but were less likely to be actively managing their forest. They had not earned any income from their forests but were interested in learning more about timber harvesting and/or timber products and marketing.

Properties owned by Ambivalent Forest Owners were generally more forested, and more likely to be zoned RU2.

Their main concerns were their own abilities and possible negative environmental impacts on their forest.

This group consisted of 12 people (or 19% of those surveyed).

This group could benefit from support that:

- Improves their skills in employing silvicultural techniques
- Introduces them to timber harvesting processes
- Increases their knowledge & understanding of land management techniques such as cool burning to reduce fire risk
- Demonstrates forestry activities that promote forest health and resilience.

These profiles accounted for approximately half of respondents - the remainder of respondents exhibited a combination of the traits listed in Forester Profiles.

Table 1. Forester Profile Comparison - See Appendix A for a copy of the Smallholder Forestry Survey.

Survey Question	Active Forest Users:	Aspiring Foresters:	Ambivalent Forest Owners:
1.2	Managed land with a greater than average area of those surveyed (104ha compared to 83ha)	Managed land with an area close to the average of those surveyed (85ha)	Managed less land than the average of those surveyed (50ha compared to 83ha)
1.3	Were highly likely to be on land zoned RU1 (89%)	Were more likely to be on land zoned RU1 than the average (69%)	Were more likely to be on land zoned RU1 (58%) but were often on land zoned RU2 (42%)
1.6	Were more likely to raise cattle (66%)	Were just as likely to use their land to raise cattle or as lifestyle blocks (31% in both cases)	Were more likely to be lifestylers (50%) than graziers (33%) or dedicating land to conservation (17%)
1.7	This group managed approximately 517ha of forest (~13% of the total forests managed by those surveyed)	This group managed approximately 593ha of forest (~15% of the total forests managed by those surveyed)	This group managed approximately 656ha of forest (~17% of the total forests managed by those surveyed)
2.1	Were much more likely aiming to supply their own household firewood as a forest management objective (88% compared to 65% of the average of all respondents)	Consistently listed commercial timber production as a forest management objective (85%) but were almost equally interested in aesthetic or landscape values (77%) and soil, water & biodiversity conservation.	Were highly likely to list soil, water & biodiversity conservation as a forest management objective (85%) followed by aesthetic or landscape values (69%).
	Were more likely to consider commercial timber production as an objective (55% compared to 41% of the average of all respondents)	Were more likely to consider commercial timber production as an objective (85% compared to 41% of the average of all respondents)	Were more likely to consider commercial timber production as an objective (54% compared to 41% of the average of all respondents)

2.2	Were more likely to have actively managed their forests (100% compared to 71% of the average of all respondents)	Were more likely to have actively managed their forests (100% compared to 71% of the average of all respondents)	Were much less likely to have actively managed their forests (15% compared to 71% of the average of all respondents)
2.8	Were twice times as likely as the average to intent to commercially harvest from their forest in the future (67% compared to 33%)	Were three times as likely as the average to intent to commercially harvest from their forest in the future (100% compared to 33%)	Indicated that they had no intention of commercially harvesting or did not respond to this question.
4.5	Not come from a particular profession (even mix of professionals, graziers and others)	Were more likely to be professionals than retired or graziers (46% compared to 31% and 15% respectively)	Were much more likely to be professionals (67%) than those working as graziers (8%), in retail/hospitality (17%), or were retired (8%)

2.5 Discussion

Small scale timber production in the Bega Valley is of interest to a wide range of people with varying professions, property sizes and forestry experience. What unites them is an interest in forests, for their income potential as well as ecological values.

Landholder Engagement and Priorities

The data strongly indicates that smallholders are actively engaged in managing their forests, with nearly three-quarters of respondents confirming active management over the past three years.

This activity is primarily driven by conservation, with soil, water, and biodiversity conservation listed as a high priority by almost all of the respondents. This is complemented by a substantial interest in non-commercial outcomes, such as aesthetic/landscape values and supplying household firewood.

While commercial timber production was indicated as an interest by roughly half of respondents, the importance of ecological values suggests that support models must frame farm forestry as complementary to, and a mechanism for, environmental goals.

The Practicalities of Forest Management

A key finding is the preference for practical, hands-on learning. Landholders overwhelmingly prefer delivery methods such as field days, site visits, and face-to-face training over digital resources. This signals a need for locally relevant, actionable knowledge that can be immediately applied on-farm, particularly around topics like planting and silviculture.

In terms of current activities, the majority of respondents (89%) who undertook forest management activities chose to complete the work themselves. This indicates a self-reliant approach and suggests that barriers may relate more to knowledge gaps, time constraints, and a shortage of labour than to a lack of willingness to undertake the work.

An Ageing Sector

Another finding of the survey relates to the age profile of respondents: young people were absent from our respondents.

- Only 14% of respondents were under 44 years old.
- The dominant age groups were 45–59 years (40%) and 60–74 years (32%).

- No respondents were in the 18–29 age bracket.

Given that forestry investment is a multi-decade commitment, the absence of younger landholders poses a long-term risk to the sustainability and succession of the sector. This issue is likely linked to economic factors, such as high property prices and limited access to land.

A third of participants indicated they had either not considered succession planning or planned to sell their property upon death or retirement. Without innovative approaches to involve younger people and secure long-term land management, the current generation of forestry and investment may go unused.

Support must find ways to address the economic and land-access hurdles that prevent younger, active managers from getting involved.

Targeted Support

The diverse goals and experience levels outlined in the Active, Aspiring, and Ambivalent Forester Profiles require a targeted approach to support and knowledge sharing, indicating that a 'one-size-fits-all' approach will be insufficient.

Active Forest Users already possess a base level of skill and are primarily seeking market-focused support. This includes connecting them with harvesters and millers, and improving their understanding of timber markets and how to access them.

Aspiring Foresters have clearer goals but also have a greater sense of uncertainty. They need clarity on regulatory hurdles and guidance regarding practicalities. Support should focus on increasing their knowledge of establishment and management of forests, as well as when and how to harvest.

Ambivalent Forest Owners need foundational support to build confidence and skills. Training in silvicultural techniques and general land management practices (like cool burning) is key, while gaining trust and demonstrating sustainable forestry practices.

These tailored approaches align with the overall finding that smallholders prefer practical, hands-on learning. Targeting support based on these profiles ensures that resources are spent addressing the most critical barrier for each group, whether it's market access, regulatory clarity, or basic skills development.

3.0 Qualitative Survey: In-depth Landholder Interviews

3.1 Introduction

The Smallholder Forestry Study employs a mixed approach to assess the farm forestry sector in the South East of NSW: an online quantitative survey of landholders, in-depth landholder interviews, and a survey of Forest Service Providers.

The quantitative survey was designed to quantify the current state and commercial potential of the industry.

Additionally, this qualitative study, made up of in-depth interviews with landholders, was designed to qualify the survey responses, provide nuance, and explore the following areas in greater depth:

- Forestry activities that landholders have undertaken.
- Future forestry plans and goals of private landholders.
- Barriers that prevent landholders from undertaking forestry activities.
- Types of support that landholders see as most beneficial.

The findings of this qualitative study reveal that the future success of smallholder agroforestry is not primarily limited by landholder interest, but by a critical need for clarity, security, and targeted assistance.

See Appendix B for a copy of the Qualitative Landholder Survey.

3.2 Methodology

Interview Design

This qualitative research was conducted through a series of open-ended, in-depth interviews with landholders who had previously participated in the quantitative online survey.

The interview questions were developed and refined before approval by the SEFH management team to ensure alignment with the study's core objectives.

Implementation

25 interviews were completed between June 2025 and October 2025.

Respondents were invited to participate in interviews, each lasting approximately 45 minutes. Interviews were conducted either in person on site or remotely by video call.

Each session began with the interviewer introducing the study's purpose and obtaining permission from the interviewee to record the conversation.

Interviewers followed a structured guide but with an emphasis on flexible, open-ended questioning to allow for the emergence of insights, intervening only to redirect the discussion when necessary.

Processing and Analysis

Following transcription, the qualitative data gathered from the recorded interviews was processed and analysed.

The transcripts then were put through a coding process. This resulted in the identification of primary findings under Themes, which were then developed using quotes from the interviews, to provide depth to the quantitative survey results.

The final stage involved communicating these findings through statistical representation and the publication of this written report.

3.3 Findings

While the challenges facing smallholders are wide ranging, there were a number of overarching themes that emerged.

Theme 1: Confidence and Uncertainty

The first main finding of the qualitative interviews relates to the sense of uncertainty or lack of confidence expressed by land managers regarding their long-term forestry activities and goals.

This uncertainty did not stem from an unwillingness to engage in forestry activities, but from the complex external factors that make long-term investment in farm forestry and Private Native Forestry (PNF) feel precarious.

The areas of uncertainty highlighted by respondents included:

1a Regulatory and Policy

The concern raised by landholders was the potential for sudden and unpredictable changes in regulations that could impact their long-term right to manage and harvest timber.

Over half of respondents (52%) indicated that clearer regulations would support them to feel more secure about forestry activities and nearly a third (32%) of respondents noted that government policy and regulations were confusing and complex. A possible ban on native forestry was also of concern for 24% of those surveyed.

As forestry activities involve decades of investment, the perceived risk of policy change outweighs the potential financial return. Landholders asked for guarantees that their investment would not be made redundant by future environmental or land-use laws.

> "We need some guarantee that if I plant trees with the purpose of being harvested some years down the track, that they will actually be harvestable and there won't be a law preventing me from doing that."

Policy shifts over time have created a climate of regulatory volatility that directly impacts investment decisions. This leads to a defensive mindset, where farmers opt for clearing or maintaining low-value grazing land rather than risking an un-harvestable tree plantation:

> "Why would I plant trees, because if I keep it cleared, then it's cleared land it can always be used for grazing. But if I plant trees and then the government tells me I can't chop them down, then I've done myself a disservice, I shouldn't have planted them."

1b Markets

Landholders expressed a lack of confidence regarding the commercial aspects of forestry. While there is interest in producing timber as a supplementary income stream, there is uncertainty around the logistics of sale and the reliability of financial returns.

Participants were able to acknowledge their lack of experience and understanding with 60% of those surveyed self-identifying as having little or no knowledge of timber markets.

Respondents were unclear on the best channels to sell harvested timber, relying on existing personal networks rather than established market pathways:

> "If I wanted to sell timber to be milled, I know people that have got mills, and I suppose that's where I would go and say, look, I've got these trees, what do we do about it? Or groups like this, I assume this is what, eventually we're gonna get to that stage, there's gonna be enough farmers with trees that need harvesting, all that's gonna need to be worked out."

1c Lack of Information and Guidance

A final contributor to low confidence is the difficulty in accessing clear, specific, and relevant technical and regulatory information. While general information is available, landholders consistently struggle to translate this into actionable plans for their properties, leading to feelings of being overwhelmed and an inability to initiate tasks.

This felt most when looking for regulatory guidance and available support programs:

> "I've just come to dead end after dead end, would be the way to put it."

For new land owners, the lack of a clear starting point was a significant hurdle:

> "The breadth and the depth of resources at the moment is unknown to me so I don't know where to even start, so this is very much an educational process for me."

In terms of barriers to knowledge, silvicultural techniques (64%) and difficulties accessing relevant information (56%) were the most common responses from interviewees.

While there have been agroforestry trial plots in the region (notably the Bega Valley Farm Forestry project), they have not led to information available to local landholders.

1d Environmental Factors

Landholders' feelings of uncertainty and risk extend to environmental factors, particularly the threat of fire and the broader challenges of climate change. This concern often drives decision-making on their properties:

> "I've been obsessive about checking whether a tree is more fire retardant or not. So I have huge concerns to try and respond to climate change in that way..."

They also faced concerns about responding to extreme weather events like drought and flood. Fire and drought risk were of great concern to people with over two thirds (68%) of interviewees noting that these factors leant a significant aspect of uncertainty to the success of any future forestry activities. This was felt more strongly by respondents that had experienced fire during the 2019/2020 Black Summer bushfires.

Another environmental consideration that affects the development of forestry is the prevalence of herbivore predation, notable from increasing deer populations. Unlike native wildlife, deer cause damage to both plantations and natural regrowth.

The uncertainty surrounding environmental conditions is a deterrent for proactive land management, as short term hurdles (such as protecting trees from wildlife), and long-term insecurities (such as threat of fire) discourage the investment of time and money needed for effective farm forestry and PNF development.

Theme 2: Structural Barriers

The second theme explores the structural barriers within the policy and regulatory framework that inhibit proactive smallholder forestry.

This is not simply a problem of confusion, but a fundamental issue where the policy environment creates disincentives and obstructions for willing landholders.

2a Forestry Prohibited in RU2 Zone (Bega Valley LGA)

Forestry is specifically listed as an activity requiring development consent in the Bega Valley's on properties zoned RU2 Rural Landscape. Under the Bega Valley Shire Council's (BVSC) Local Environmental Plan (LEP), the RU2 zone is intended to maintain the rural landscape character, and forestry was judged incompatible with these objectives by the council during the LEP application in 2013.

Of those surveyed in the Bega LGA, 25% of respondents managed land zoned RU2 accounting for approximately 420 hectares of forested area.

In early 2024, the council debated a motion to make private native forestry "permitted without consent" in RU2 zones. The BVSC is considering amending the LEP to simplify the process for landowners, and is currently assessing the path forward.

Properties that are allowed to conduct forestry activities are subject to the NSW Private Native Forestry Codes of Practice, which are administered by Local Land Services under the Local Land Services Act 2013. These codes provide comprehensive guidelines for operations and consolidate regulations.

2b Threatened Species Regulations

Practicing regenerative land management along with an aim to increase biodiversity were the most common goals for those surveyed (76% and 72% respectively) with more than half (52%) indicating that they aimed to achieve both of these objectives. This increases the likelihood that active forest management will attract threatened species to their land and be restricted by relevant policies.

Landholders expressed a significant sense of insecurity that actively works against the goals of environmental stewardship and forest health.

The perception is that improving habitat or proactively monitoring their forests could result in regulatory penalties, such as the imposition of exclusion zones or the sudden loss of control over their land.

Landholders worry that investment of time and money in improving forest health is a "risky endeavour" because "it's entirely plausible that regulations could change very suddenly, meaning no access or no potential for any return."

One respondent articulated this structural disincentive clearly:

> "The regulations feel, in terms of exclusion zones for threatened species, like they are perhaps not incentivising management that encourages their occupancy, because for some of the species, some of which plausibly could visit this forest, the exclusion zones are dramatically large."

When the act of improving the environment or identifying new species is perceived as a financial or management risk, landowners are incentivised to maintain low-value forest or avoid monitoring altogether.

2c Complex Support Landscape

Landholders face confusion navigating the array of organisations and support programs available. There is a sense of bureaucratic fragmentation that prevents them from formulating clear, long-term plans.

This was reflected in surveys when people indicated which organisations they had approached for support. Over ten different sources were cited: Landcare groups, local councils, LLS (including the PNF team), SEFH, SEAN, NSW Forestry, Pentarch, the Bega Valley Farm Forestry project (historical), Men of the Trees (historical) and independent consultation from production nurseries and forestry consultants.

Interviewees expressed difficulty in determining the role of various agencies and precisely what grant money was intended for, making it impossible to align support with their long-term land management objectives.

Accessing funding and permits can also require expertise that is unavailable to small-scale growers:

> "I was all geared up to put in an application for that to assist with funding to establish the plantation but then came up with the hurdle of trying to find someone to do a forestry management plan."

Collectively, these structural barriers demonstrate a significant misalignment between policy architecture and long-term land management goals.

Theme 3: Support Needed

When asked, landholders suggested a range of mechanisms that they would find supportive. The support that respondents indicated went beyond the financial, focused on delivery models, practical knowledge, and the establishment of networks.

3a Practical Knowledge

Landholders asked for practical information, training and demonstrations that can overcome the feeling of being overwhelmed and not knowing where to start.

Field days were highly valued, particularly those demonstrating accessible technology and techniques:

> "Field days are always very useful, seeing other people's properties, having like ... those days with Lucas Mills or Alaska Mills, seeing what you can do with relatively basic machinery."

Other requests included simple, consolidated educational resources, such as a "one-pager with when to prune, thin and growth rates." This emphasis highlights that successful support must be pragmatic and easily translated into on-farm action. A desire for written guides was also expressed by 52% of participants.

The most requested delivery methods of information that people were seeking were workshops/field days and expert advice that were both indicated by 64% of respondents.

3b Network and Community Support

Given the dispersed and often disconnected nature of smallholder operations, community and peer networks were mentioned as a source of support. These networks provide both technical guidance and overcome feelings of isolation.

This kind of model can become an asset, particularly when structured through formal training, which creates lasting relationships with knowledgeable neighbours:

> "I would also feel like I would probably refer to my fellow students in the agroforestry course... So in that regard I feel fairly fortunate that we have that network."

Landholders are also keen for informal, local opportunities to connect and share ideas at simple gatherings:

"It would be great to have meetings where we can all meet informally just hang out... and talk about what we're up to and share information and keep in touch."

Groups like the South East Agroforestry Network (SEAN) were identified as key to helping landowners "upskill and get involved" and achieve positive outcomes.

Participants were looking for a network of support in some form whether that be via mentorship, a targeted network, community support or a cooperative model. 72% of respondents indicated they would be interested in participating in such groups.

3c Collaborative Models

The structure and delivery of financial support was also mentioned by a number of interviewees. The most successful examples of support were those that fostered a sense of genuine partnership between the landholder and the supporting agency.

A Local Land Services (LLS) Riparian Planting program was highlighted as a model for effective engagement:

> "The good thing about the LLS program was that it was a 50-50 or a give-and-take sort of project and you definitely felt like they were partners... to the degree that after the fires they came back and replanted which was pretty amazing."

This model - which provided grants for fencing, free trees, and site preparation - significantly reduced the monetary barrier, making labour the primary input.

In terms of financial barriers, the up-front costs (36%) and long term nature of the investment (48%) were commonly mentioned by those surveyed.

Integrated support, combining targeted knowledge, strong networks, and reliable funding, emerged as opportunities for scaling up smallholder forestry in the region. Otherwise, the confidence and resources required for long-term investment remains a barrier to many landholders.

3.4 Discussion

The qualitative findings show that the main constraint on the growth of Smallholder and Private Native Forestry (PNF) projects in the South East of NSW is not a lack of interest. Landholders are willing to engage in forestry activities, but need support overcoming barriers, and accessing support.

Policy vs stewardship: The desire for soil, water and biodiversity conservation is a primary objective for most landholders. Yet, regulatory constraints—specifically the RU2 zoning restriction and the application of Threatened Species Regulations—create a disincentive.

The perception is that improving forest health or identifying rare species is a "risky endeavour" that could lead to financial penalties or the loss of control over the land.

Barriers to investment: Forestry is a multi-decade investment, but landholders lack confidence that their long-term efforts—the time, effort, and money needed to manage heavy regrowth—will ever lead to a harvestable product or financial return.

This uncertainty around long-term harvesting rights is compounded by market uncertainty; participants are unsure of reliable commercial pathways or financial returns, making up-front costs feel risky.

Practical knowledge: The interest in field days, site visits, and short courses confirms that landholders prioritise practical knowledge that they can apply, rather than passive, general resources. They need consolidated, simple resources.

Peer networks: Community networks and connections built through formal courses, are highly valued as they alleviate the physical isolation of smallholder operations and provide trusted, shared knowledge.

4.0 Forestry Service Provider Interviews

4.1 Introduction

This qualitative study focused on the commercial side of the Forest industry of the South East, and was designed to identify and explore the constraints and opportunities for Forestry Service Providers (FSPs) operating in the region.

These interviews with FSPs - including millers, arborists, and nurseries - employed a combination of initial quantitative questions (largely to provide an inventory of the sector), followed by in-depth, open-ended questions to explore the following areas:

- The supply and demand dynamics of local timber markets.
- The economic and political challenges impacting business viability.
- The importance and implementation of sustainable forestry practices.
- The opportunities for growth in the local sector.

The findings of this qualitative study reveal that the operating environment for local FSPs is becoming more challenging over time.

See Appendix C for a copy of the Forestry Service Provider Survey Questions .

4.2 Methodology

Interview Design

This qualitative research was conducted through a series of open-ended, in-depth interviews.

Providers were identified through businesses known to SEAN, recommendations by people working in the industry, internet searches and SEFH contacts.

The interview questions were developed and refined before approval by the SEFH management team to ensure alignment with the study's core objectives.

Implementation

25 interviews were undertaken between May 2025 to September 2025.

Respondents were invited to participate in interviews, each lasting approximately 45 minutes. Interviews were conducted either in person or remotely by phone.

Each session began with the interviewer introducing the study's purpose and obtaining permission from the interviewee to record the conversation. When interviewees were reluctant to be recorded, and their responses were written down during the interview.

Processing and Analysis

Following transcription, the qualitative data gathered from the recorded interviews was processed and analysed.

The transcripts then were put through a coding process. This resulted in the identification of primary findings under Themes, which were then developed using quotes from the interviews.

The final stage involved communicating these findings through statistical representation (see Appendix E - Full Results of Forest Service Provider Survey) and the publication of this written report.

4.3 Findings

We spoke to a wide range of FSPs over the course of the study. For the demographics of this group see Appendix E - Full Results of Forest Service Provider Survey.

While the challenges facing these businesses vary depending on the services provided, there were a number of overarching themes that emerged.

Theme 4: Supply Constraints

The first primary finding relates to fundamental issues surrounding the Supply of raw forestry and timber products required by FSPs to conduct their core business activities.:

Limited Supply from the local area

We found a reliance of local FSPs on timber sourced from outside the region, particularly the Sydney market and Queensland. This was also the case for pine logs grown in the region.

Providers noted that they source interstate for higher-specification timbers, because of the need for species with superior durability and bushfire-retardant qualities, and to meet market demand.

> “Most of our timber comes out of Queensland. Locally we do get some but there's not much available and because we're in a bushfire zone here we need the bushfire retardant timbers so we're chasing the spotted gums and ironbarks out of Queensland, North Coast blackbutt and then locally we use the fastigata and ash.”

Furthermore, providers noted a growing difficulty in securing larger log sizes and stronger hardwood grades, linking it to the age and condition of local forests.

> “I have a bit of trouble getting some hardwoods now, like the blackbutts and the F27s. And getting them in length. But if the trees are only this tall, you can only get that much timber out of them, you can't get longer ones.”

Sawlog Exports

Compounding the local Supply shortage are broader market dynamics and policy issues. Several businesses expressed frustration that high-quality local hardwood sawlogs are exported unprocessed.

These logs are milled at a lower cost overseas, primarily in China, and are often imported as finished products, undercutting local processors.

> “The flow-on affects other industries such as manufacturing, furniture making. Our local manufacturers, the ones that are still going, find it now very, very difficult to compete with Chinese products that's been built in China from Australian hardwood logs.”

Interviewees highlighted this as a policy issue, observing that while Australia exports raw materials, countries like Malaysia and Indonesia only sell value-added timber products to the Australian market.

Closure of Victorian Forestry Industry

The recent decision by the Victorian government to ban native forest harvesting was also identified as a major disruptive force.

Although the study focuses on NSW, the withdrawal of Victorian supply increased pressure on NSW-based mills and resources, putting a strain on the regional hardwood resource base as other regions compensate for the loss of cross-border supply.

Depleted Forest Estate

Many FSPs identified that the hardwood species growing in the local region are not ideal for high-value products - when compared to more durable or fastest-growing trees.

Some respondents suggested this may be due to environmental factors such as poor soils and lower rainfall, but others pointed to historical forest management practices.

> “I think the first cut of these forests was all for sleepers and things. So they would have gone through and picked out all those durables. And then if that's all you took out, you just leave the non-preferred, non-durable species and then that's what's regenerated.”

This historical high-grading, combined with the market demand for low-grade products, has significantly shaped the forest resource. One interviewee identified that the market also has an effect, that because local producers have found a market for low value timber products, that demand influences forestry practice.

> "Having a market for a low grade product really changes the dynamics and they've never really had those strong low-grade markets on the North Coast."

Additionally, severe events like the 2019/20 bushfires were noted to have drastically altered the structure of local forests, further differentiating the resource from more resilient regions:

> "You look at the resource around here - it's all triggered from a major fire event. So a very different sort of history to the forests, whereas on the North Coast you'll get that big fire but all the trees will survive."

Theme 5: Barriers to Demand

This second theme focusses on the Demand for the output of our local FSPs - the trends that they are seeing within the markets they serve.

5a Consumer preferences

A consistent finding was that the hardwood species growing in the South East region are not the species preferred by the larger NSW market, which is heavily dominated by North Coast species. Consumers are more aware of these northern grown species, and look for them by name.

> "New South Wales is dominated by the North Coast. They'll cut 150,000 cubic meters of saw log a year for all the mills, probably more than that. The South Coast is cutting 20,000 - 25,000 cubic meters of saw log a year. So the market is dominated by the North Coast species."

Providers are actively working to build markets for local species like Eucalyptus viminalis for structural grade timbers, but adoption has been slow.

> "We've been trying to build markets for viminalis and we've done some work on that and trying to turn it into structural grade timbers because there's a limited market out there for that timber."

This is highlighted by the observation that local species, such as brown barrel (Eucalyptus fastigata), have been considered undesirable locally, yet Victorian mills successfully turn them into high-value flooring products, pointing to a market opportunity. This trend has begun to soften as more desirable species become scarce.

5b Competition from imported species

The competition from imports is also a major factor. Australian timber retailers frequently prefer to stock imported timbers due to their lower price point, posing a significant competitive threat.

FSPs directly linked this to poor policy oversight, noting the environmental and ethical consequences that arise when cheaper imports are sourced from markets with fewer regulations or restrictions.

> "I can buy merbau from overseas cheaper than I can buy Australian. It comes down to price a lot of the time. Personally I think Australian suppliers will price themselves out of the market."

5c Changes in Building Materials

A significant recent trend is the decrease in demand for traditional timber products in rural construction. Following the Black Summer bushfires, smaller providers supplying green timber products have seen a widespread culture change, with consumers increasingly using steel for fencing, livestock yards, and sheds.

This shift is compounded by nervousness over planning laws, making the simplicity and perceived compliance of using steel a more attractive option than wood.

> "The big culture change since the fires is just people use steel for fencing and yards, portable yards, they can put up yard panels quick than timber stuff, all sheds are all steel. You barely see a wood fence post used now."

Theme 6: Political Challenges

Another theme of these interviews relates to government policy regarding forestry in NSW. The majority of respondents advised that their business activities were impacted negatively by local, state and/or federal government policy.

6a Lack of Political Support

The industry feels it suffers from a significant public perception problem, which makes politicians reluctant to support or advocate for it, suggesting that timber is taboo.

Respondents noted that political engagement is sparse, reflecting a general lack of knowledge among decision-makers regarding the realities and regulations of modern forestry.

This often results in a policy environment defined by reactionary, short-term policies designed for popular appeal rather than for long-term industry sustainability.

As one provider put it, politicians "make decisions based on what people want to hear... and it's got nothing to do with sustaining industry."

> “I noticed that the election before this one was the first time we ever had a Labor candidate come out to site. They've never been here. Before then, we always had the Liberal candidates come out and talk to us..… but neither of them put us on Facebook because timber is a dirty word.”

6b Regulatory and Compliance Confusion

Another common challenge is the difficulty in navigating complex regulatory environments.

Providers involved in earthworks and vegetation management expressed frustration over a lack of clarity, stating that compliance is "not black and white, it's very grey."

They noted a lack of inter-agency collaboration and the difficulty of engaging directly with government departments, such as the EPA. Regulations can be so unclear that government staff could not provide clarity on site criteria, leading to the logistical challenge of being advised to check "every job" with regulators.

The ultimate outcome is a fear of unknowingly breaking the law, citing instances of contractors being fined for highly technical compliance failures.

> “There's nothing out there that I can just pick up and say hey, these are the main considerations you should be aware of when doing any vegetation management."

6c Need for Advocacy

Finally, there is a sense of frustration regarding the industry's own response to public scrutiny. The hardwood sector is perceived as accepting criticism without an effective public relations defence based on information about sustainable practices.

Providers feel a strong need for better industry advocacy and public education because, outside of the sector, people "don't really understand the true definition of what forestry is and what it can be," leading to misinformed public judgment.

> “Unless you're in the forestry industry no one really knows what it's about really. It's not very highly advertised. People might just drive past and say 'that looks bad, it's a mess there' and that's all you get in the public eye I suppose."

4.4 Discussion

Findings show that the challenges facing Forestry Service Providers (FSPs) in the South East region are structural and compounding, yet they also point toward opportunities for innovation and policy change.

Residual Biomass

The most transformative opportunity lies in leveraging low-grade timber and forestry residue to create new industries like bio-char, and biofuels. This addresses the resource quality issue while satisfying the market's need for sustainable inputs.

This also aligns with the vision of some FSPs to use "every single scrap" of a harvested tree.

Forestry on Private Land

There is a growing interest among landholders in Private Native Forestry (PNF) Agreements in the region, particularly since the Black Summer bushfires.

In addition to PNF, a strategic opportunity exists in promoting and supporting the establishment of dedicated plantations on private land.

Plantations offer the ability to cultivate specific, high-yield species preferred by the market (such as Spotted Gum or Southern Mahogany) under controlled conditions. With time, these forests can provide a stable, long-term resource base that can help to improve Supply in the region.

Fostering Local Processing

An opportunity exists in adopting advanced manufacturing techniques to maximise material efficiency and create higher-value products. For example, exploring innovations such as lamination allows manufacturers to turn smaller offcuts and lower-grade timber into high-value engineered beams.

R&D investment and a commitment to local innovation and processing aligns with the goals of fostering the local industry and improving resource utilisation.

5.0 Conclusion

The Smallholder Forestry Study, commissioned by the South East Forestry Hub (SEFH) and conducted by the South East Agroforestry Network (SEAN), employed a mixed-method approach to assess the opportunities and constraints of the smallholder forestry sector in the Bega Valley LGA. By combining broad quantitative data from landholders with insights from the qualitative study of both landholders and commercial Forestry Service Providers (FSPs), a picture has emerged.

The central finding is that the industry’s future success is not limited by a lack of interest or engagement from smallholders. Rather, growth is constrained by an environment of high perceived risk, conflicting policies, and unclear pathway to market. The core challenge is providing the stable framework required to support the multi-decade investment that forestry requires.

Policy and Regulatory Uncertainty

The biggest challenge facing the industry is a conflict between the policy framework and investment confidence.

This takes the form of constraints such as local planning barriers (like the RU2 zoning restriction) and the outcomes of environmental regulations, which discourages proactive land stewardship.

This low-confidence environment is mirrored commercially, where Forestry Service Providers are subject to reactive, short-term policies and operating under confusing compliance criteria.

Collectively, the current regulatory environment fails to provide the stable, assured framework necessary to encourage long-term commitment from any sector.

Market Insecurity

Landholders lack clear commercial pathways, leading to uncertainty about the logistics of sale and the reliability of financial returns. That said, it is clear that Forestry Service Providers are most impacted by market pressures.

FSPs struggle with a limited local supply of durable, high-grade hardwood. The local resource is further disadvantaged by a history of high-grading and recent major fire events.

A significant frustration for local millers is the continued export of raw hardwood sawlogs which are then processed overseas and imported as cheaper, value-added products, directly undercutting local production.

Additionally, Local South Coast species are often not the ones preferred by the broader NSW market, which is dominated by better-known North Coast species.

Knowledge Gaps

While landholders are keen to learn, the available information is often difficult to translate into concrete action, leading to feelings of being overwhelmed.

There is an overwhelming preference among smallholders for face-to-face, practical training, such as field days and site visits, over digital or online resources. This practical support is needed to develop skills in areas like silvicultural techniques and hazard reduction.

Critically, the quantitative survey revealed a significant demographic challenge: the vast majority of respondents are reaching retirement age. This creates a major risk to the longevity of the sector's land-based investment.

5.1 Recommendations

Addressing the constraints facing smallholders and Forestry Service Providers (FSPs) requires a coordinated effort across three strategic areas: policy reform, practical support, and market innovation.

Policy and Regulatory Reform

1. Establish long-term certainty: Offer government-backed assurances of long-term harvesting rights for registered Private Native Forestry (PNF) plans and plantations. Overcoming the perceived risk of policy reversal, and addressing landholders' desire for guarantees about harvestability.

2. Remove zoning barriers: Prioritise working with the Bega Valley Shire Council to amend the Local Environmental Plan (LEP) to simplify or permit forestry activities within the RU2 zone. The current restriction on land zoned RU2 affects around 25% of the surveyed landholders and creates a significant barrier.

3. Investigate log exports: A policy investigation into the export of raw hardwood logs should be a priority, focusing instead on incentives and support for the export of value-added timber products. This addresses the competition to local processors who are undercut by the importation of cheaper, processed Australian timber.

4. Reform Threatened Species Regulations: Review the application of Threatened Species Regulations to ensure they incentivise, rather than penalise, proactive management that encourages biodiversity and forest health. The perception that improving habitat or identifying new species is a "risky endeavour" is actively working against environmental stewardship goals.

Practical, Collaborative Support

5. Deliver hands-on training: Implement training programs for smallholders via field days and site visits, focusing on silviculture (like pruning and thinning), plantation establishment, and linking them with harvesters and millers. Landholders overwhelmingly prefer practical, face-to-face learning compared to digital resources and webinars.

6. Improve access to knowledge: Consolidate complex guidance into simple, readily accessible resources, such as a 'one-pager' with when to prune, thin and growth rates. This is a direct request from participants to address the knowledge

gap and the feeling of “not knowing where to start”.

7. Address disadvantage for smallholders: Recognise that smaller growers are at a disadvantage, as they cannot afford to purchase forestry advice, unlike larger companies and forest managers. Support mechanisms must mitigate this high cost expertise barrier, by providing support for forestry management plans.

8. Peer-to-peer networks: Foster strong, local networks and informal gatherings where smallholders can learn directly from successful models. Support the development of demonstration sites, where smallholders can learn directly from successful models. 72% of landholders indicated they would be interested in participating in a network of support, whether via mentorship, a targeted network, or a cooperative model.

9. Collaborative financial models: Financial programs should focus on reducing the upfront costs and labour burden through collaborative investment models, similar to the successful Local Land Services (LLS) Riparian Planting program, which provided grants for fencing and trees.

Market Development and Advocacy

10. Improve market transparency: Work to increase transparency of log prices so that growers can more easily understand and access the commercial market, reducing the uncertainty around the logistics of sale and the reliability of financial returns.

11. R&D of local processing: Support innovation to develop new markets and uses for local low-grade timber and forestry residue, such as bio-char and biofuels. This is particularly important due to the condition of the local forest estate.

12. Advocacy campaign: Implement a fact-based public relations campaign to proactively educate the public about the positive economic, fire management, and sustainability outcomes of domestic timber production.

13. PNF Certification: Investigate a regional certification scheme for PNF timber. This dual approach will help secure local supply and improve public perception by providing verified, local products.

References

Government Publications

Australian Bureau of Statistics. Bega Valley 2021 Census All persons QuickStats. Retrieved 29 October 2025 from
https://abs.gov.au/census/find-census-data/quickstats/2021/LGA10550

Bega Valley Local Environmental Plan (NSW).
https://legislation.nsw.gov.au/view/html/inforce/current/epi-2013-0408

Bega Valley Shire Council (2018). Bega Valley Shire Local Weed Management Plan (Draft).
https://begavalley.nsw.gov.au/files/Draft-BVSC-Weed-Management-Plan1.pdf?v=1586770220

Fire and Rescue NSW. (2022, August 9). Fire and Rescue NSW conducts 'cultural burns' in bushfire-prone areas - Video - Merimbula.
https://www.fire.nsw.gov.au/incident.php?record=recqhCeIXAOTmYebC

Walsh + Monaghan (2022). Bega Final Report 2022.
https://www.valuergeneral.nsw.gov.au/land_value_summaries/reports/2022/Bega_Valley.pdf

Growing a Better Australia
A billion trees for jobs and growth
Australian Government, Department of Agriculture and Water Resources. 2018
https://www.agriculture.gov.au/agriculture-land/forestry/publications/growing-better-australia

National Forest Industries Plan
Implementation, election commitments and other measures
Australian Government, Department of Agriculture, Water and the Environment. 2021
https://www.agriculture.gov.au/agriculture-land/forestry/national-forest-industries-plan

Australia's State of the Forests Report Synthesis 2023
Australian Government, Department of Agriculture, Fisheries and Forestry. 2023
https://www.agriculture.gov.au/abares/forestsaustralia/sofr/sofr-synthesis

Academic Reports

2025 Cultural Land (Forest) Management
Concepts, Constraints and Opportunities in South-East NSW
Report prepared for the South East Forestry Hub by Dr Tony Bartlett AFSM.

2025 Overcoming constraints to the Planted Forest-based Value Chain in Australia
Researcher at the Fenner School of Environment & Society ANU, Malinda Zhu

2024 Landholder barriers and incentives to timber production in north east New South Wales
prepared for the North East NSW Forestry Hub by Mia Cassidy and Graeme Palmer, Southern Cross University.

2024 Report on the suitability to produce sawlogs of private property forests in Southern NSW PNF code region
prepared for Local Land Services, NSW Government, DPI
by Dr Masoomeh Alaibakhsh & Mr J Samuel, DPI Forest Science, Parramatta.

2023 Economic Contribution Study of the NSW hardwood timber industry
prepared for the North East NSW Forestry Hub by Ernest and Young.

2017 Private native forest owned attitudinal survey - Northern NSW
Understanding forest owners value and use of their private forest resource
prepared for DPI, NSW by Dr Lain Dare, Dr Jacki Schirmer, Mel Mylek, University of Canberra.

Forestry Trials

2023 Assessment of farm forestry trials established in the Bega Valley 1994-2008
by David Newell. May, 2023

2008 Tree establishment on farms in south east NSW
Results of trials established 1994 to 2006 by SE NSW Farm Forestry Project/ SE NSW Regional Plantation Committee/ SE NSW Private Forestry Development Committee/ SE NSW Trees on Farms prepared for DPI, NSW by Louise Maud, Project Manager 1993 to 2006.

Appendices

Appendix A - Copy of Quantitative Survey

South East Forestry Hub

Smallholder Forestry Study

The South East Agroforestry Network (SEAN) is conducting the following survey on behalf of the South East Forestry Hub.

The South East Forestry Hub is one of eleven regional forestry hubs established under a Commonwealth Government Grant Agreement which contributes to the National Forest Industries Plan.

Australia is the 6th most forested country in the world (according to the FAO) and yet we are not self-sufficient in wood supply. An objective of the Hub is to provide advice to the Commonwealth Government on the opportunities and challenges to increasing the domestic supply of wood products.

SEAN is a network of landholders based in the Bega Valley and South East NSW that share an interest in growing trees on farms.

Our goal is to better understand the opportunities and barriers landholders face when engaging in forestry activities on their properties.

The survey is open until 30th April 2025.

If you have any questions, please contact: SouthEastAgroforestryNetwork@gmail.com, or 0401 430 292.

The survey will take around 10 minutes to complete. All completed surveys will go into the draw to win 1 of 3 $100 vouchers to the Riverside Nursery, Bega.

Please note that your responses throughout the survey will remain anonymous and confidential.

Thank you for your participation.

Section 1. Property information

This section asks questions about your property and land use. When answering questions throughout this survey, please answer for one property only.

Your property

Q1.1 Property address

____

OR Locality _____________________

Q1.2 What is the total area of your property?

_______ acres or ______ hectares (ha)

Q1.3 What is the local council zoning on your property?

☐ Primary production (RU1)
☐ Rural landscape (RU2)
☐ Residential
☐ Environmental
☐ Not sure
☐ Other (please specify) ______________________

Q1.4 Do you:

☐ Own and live on this property
☐ Rent and live on this property
☐ Own this property and live elsewhere
☐ Other (please specify) ______________________

Q1.5 How many years have you owned or rented the property?

☐ 0-5 years
☐ 6-10 years
☐ 11-20 years
☐ 20+ years

Q1.6 What is the main land use on your property?

☐ Grazing
☐ Lifestyle
☐ Farm Forestry
☐ Conservation
☐ Horticultural
☐ Other (please specify) ________________________

Q1.7 What is the ratio of Forest and Agricultural land on your property?

Forest __________%
Agricultural_______%
Other________________%

Q1.8 Please indicate the ratio of these forest types in your property (totalling 100%)

Mature native forest (80+ years)__________%
Regrowth native forest (30-79 years)______%
Young native forest (0-30 years)__________%
Pine (softwood) plantation_______________%
Eucalypt (hardwood) plantation ___________%
Other (please specify)__________________%

Q1.9 Have you noticed any signs of disease, pests, or stress in your forest?

☐ Dieback due to drought
☐ Insect infestation
☐ Fire damage
☐ No, forest in good health
☐ Not sure
☐ Other (please specify) ________________________

Q1.10 Has your property experienced any fires in the past 10 years?

☐ Yes, prescribed burn
☐ Yes, low intensity bushfire
☐ Yes, high intensity bushfire
☐ No fire in the past 10 years
If yes, how long ago was this fire? ____

Section 2. Forest management

This section asks questions about the forest on your property and the management practices that you use.

Forest management

Q2.1 Please indicate which of these forest management objectives you are interested in:

☐ Supplying household firewood
☐ Storing carbon
☐ Grazing stock
☐ Commercial timber production
☐ Aesthetic or landscape values
☐ Recreational activities (e.g. fishing, hunting, camping)
☐ Soil, water and biodiversity conservation
☐ Other (please specify) ____

Q2.2 Have you been actively managing your forest in any way over the past 3 years?

☐ Yes
☐ No - **Go to Q2.10**

Q2.3 Which forest management activities have been performed in your forest over the past 3 years:

☐ Harvesting trees for commercial use
☐ Harvesting trees for personal use
☐ Managing forests (e.g. pruning or thinning)
☐ Pest and weed management
☐ Hazard reduction (e.g. burning or clearing understory)
☐ Planting and regeneration
☐ Enhancing habitat (e.g. installing nest boxes)
☐ Other (please specify) ____

Q2.4 Did you conduct the majority of these forest management activities yourself (rather than contracting this work)?

☐ Yes
☐ No

If no, who did you engage for this work? ___________________________________

Q2.5 How long have you been involved in forest management?

☐ Less than 1 year
☐ 1 to 5 years
☐ 6 to 10 years
☐ More than 10 years

Harvesting your forest

Q2.6 Have you undertaken any harvesting activities within your forest in the past 3 years?

☐ Yes
☐ No – **Go to Q2.8**

Q2.7 Type of harvest operation?

☐ Selective harvesting
☐ Clearfell harvesting
☐ Land clearing
☐ Commercial thinning
☐ Other (please specify) ____

Forest harvesting intent

2.8 Do you intend to commercially harvest your forest in the future?

☐ Yes
☐ No – **Go to Section 3**

Q2.9 What areas of your forest do you intend to commercially harvest in the future?

☐ Regrowth native forest (30-79 years)
☐ Young native forest (0-30 years)
☐ Softwood plantation (e.g. Pine)
☐ Hardwood plantation (e.g. Eucalypt)
☐ Other (please specify)___________________

Go to Section 3

Q2.10 Please indicate your reasons for not actively managing or harvesting your forest. Tick as many as apply.

☐ My forested area is not mature enough to harvest
☐ I don't believe I can make a financial return on it
☐ I have no financial need to harvest timber
☐ I think it would harm the forest's environmental values
☐ I am not permitted to harvest due to legal restrictions
☐ I don't have enough knowledge to harvest
☐ I'm interested in biodiversity and/or carbon credits
☐ Concerns over Codes of Practice
☐ Other (please specify) ____

Section 3. Information sources

This section explores the place where you access forest management information.

Q3.1 What areas of forest management would you like more information about? Tick as many as apply.

☐ Harvesting timber
☐ Silvicultural techniques (e.g. thinning and pruning)
☐ Legislation and regulation
☐ Carbon credit schemes
☐ Biodiversity credit schemes
☐ Weed and pest control
☐ Understanding PNF code requirements
☐ Hazard reduction (e.g. burning, slashing, fire breaks)
☐ Planting and revegetation
☐ Monitoring native flora and fauna
☐ Timber products and marketing
☐ Other (please specify) ________________________

Q3.2 How would you like to access forest management information? Tick as many as apply.

☐ Training courses (face to face)
☐ Field Days
☐ Online resources factsheets, videos, etc
☐ Site visits
☐ Phone or email
☐ Webinars and web based training
☐ Other (please specify)_______________________

Private Native Forest (PNF) Plan

A PNF Plan is an approval under the Local Land Services Act 2013 to carry out private native forestry operations.

Q3.3 Do you have an active PNF Plan with LLS for your forested areas?

☐ Yes
☐ No
☐ Not sure

Q3.4 Are you interested in establishing a PNF Plan with LLS for your forested areas?

☐ Yes
☐ No
☐ Not sure

Section 4. Demographic information

This section collects information about you and your circumstances. This helps us to understand trends within the broader community.

Please remember that all information provided is confidential.

Q4.1 What is your gender?

☐ Female
☐ Male
☐ Prefer not to say

Q4.2 What is your age?

☐ 18-29 years
☐ 30-44 years
☐ 45-59 years
☐ 60-74 years
☐ 75+ years

Q4.3 Have you considered or made plans for the future management or ownership of your forest?

☐ Yes, I have a succession plan in place.
☐ Yes, I'm working on a succession plan.
☐ Yes, I've thought about succession, but have no plan.
☐ No, I have not considered succession planning.
☐ No, This property will be sold upon my death/retirement.

Q4.4 Are you involved in any local forestry or environmental groups? Please tick as many as apply.

☐ South East Forestry Hub
☐ Landcare
☐ South East Agroforestry Network
☐ A neighbourhood group
☐ SCPA - South East Producers

☐ Bega Circular Valley

Q4.5 What is your primary occupation?

☐ Farm forester
☐ Grazier/Dairy farmer
☐ Cropping farmer
☐ Professional (e.g. lawyer, accountant, doctor, teacher, nurse, policeman)
☐ Tradesman (e.g. plumber, electrician)
☐ Retail/Hospitality
☐ Retired
☐ Other________________________

Q4.6 Have you engaged in any education <u>in the field of land management</u>?

☐ High School
☐ TAFE (or equivalent)
☐ University
☐ Short course
☐ Other ________________________
☐ I do not wish to give this information

If yes, please specify: ____

Q4.7 In the last financial year, what was your annual household income before tax? This includes the income earned by all working people in your household.

☐ $0-39,000
☐ $40,000- 79,000
☐ $80,000 - 119,000
☐ $120,000 or higher
☐ I do not wish to give this information

Q4.8 Was any of your household income derived from forestry over the past 3 years?

☐ Yes
☐ No

If yes, please indicate a percentage of your household income ______%

Thank you for participating in the survey.

☐ I am interested in hearing more from South East Forestry Hub or South East Agroforestry Network about this study.

☐ I would like to enter the draw to win 1 of 3 $100 gift voucher to Riverside Nursery.

Please provide contact details:

Name:

____

Email:

____

Phone number:

____

Please note that some survey participants may be contacted regarding an in-depth follow up interview.

Appendix B - Copy of Qualitative Smallholder Forestry Survey

Qualitative Smallholder Forestry Survey

Research purpose

- To identify barriers that impact people's abilities to undertake agroforestry/PNF activities
- To identify sources and types of support that positively impacted people's abilities to undertake agroforestry/PNF activities

We want to know the barriers that prevent people doing agroforestry/PNF.
We want to know what supports have helped people the most in undertaking agroforestry/PNF and what were the sources of that support.

Interview Process

1. Introduce interviewer, survey, reason for undertaking the survey and confidentiality.
Hi, my name is Lisa/Trina/Ben and I'm here today to talk to you about your experience with forestry on your land. We're trying to get an understanding of what influences people in their decisions relating to forestry activities and where they go for information to support them in that.
I'm with the South East Agroforestry Network, we're a peer to peer support group `for people interested in small-scale sustainable timber production in the south east of NSW and this survey is being run on behalf of the South East Forestry Hub. I'm recording this interview so I can chat with you without taking notes but once we're done, the interview will be transcribed and we'll try to extract the themes and trends in the area from that information. Individual people aren't identified from the transcriptions and all the information is compiled without identifying data. So your name and property details won't be linked to the information gathered in this conversation and we do this so that people can be open and honest when answering the questions.
2. Go through the interview questions.
To redirect back to the interview questions in the event a respondent goes off on a tangent. If the respondent wants to ask the interviewer questions about other topics

such as SEAN, these can be answered after the interview. To maintain focus on the interview process & be mindful of time restraints

3. Thank the respondent for their time, advise of the details for their nursery gift card.

Survey Questions

1. **Can you tell me about the land you manage and what you do there?**
   Potential probes:
   How large is the property?
   How long have you managed the site?
   Do you know your properties' local zoning classification?
   How do you define 'success' in relation to your land management?

   Purpose: Non-threatening start of interview, locates property within the study area, gains a sense of land size, use & history.

2. **Can you tell me about your experience on the property with forestry/farm forestry/agroforestry/private native forestry?**
   Potential probes:
   What started your interest in forestry?
   Did you find it easy or challenging to do forestry?
   How confident do you feel in your ability to manage your forest sustainably?
   What skills or knowledge do you feel you need to further develop in order to achieve your forestry goals?

   Purpose: Elicit description of forestry activities they have undertaken, when, where, why/why not, what influenced their decisions to commence/halt forestry activities

3. **What information do you feel contributed to your decisions around forestry activities?**
   Potential Probes:
   Was it easy or difficult to find useful forestry information?
   Where did the information come from?
   Was the information you accessed was helpful/unhelpful?

What kind of support do you wish was more readily available?
Are there any local organisations or groups that you feel are particularly helpful?
Purpose: Identify the types and sources of information people access in relation to forestry activities, what was the most useful, what was the easiest to understand, how did people access information and how easy/difficult was that process.

4. **Do you plan to undertake forestry activities in the future and what are the reasons for this?**
   Potential Probes:
   What kind of forestry activities are you planning?
   What are your biggest concerns related to undertaking forestry activities?
   How important is the environmental impact of your land management?
   How have extreme weather events changed your forestry plans or activities?
   What do you think the wider community feels about forestry in the area?

   What would it take for you to feel more secure about the future of smallholder forestry in this region?

   Purpose: Explores the factors contributing to people's decisions to commence/continue/halt forestry activities.

5. **Do you see forestry activities on your farm as a source of potential income?**
   Potential Probes:
   Do you see forestry activities on your farm as a source of potential income?
   What kind of financial investment have you made in your forestry activities?
   How long would you expect to wait to see a return on your investment?
   What do you know about the markets for timber or forest products?

   Purpose: Explores the financial considerations contributing to people's decisions to commence/continue/halt forestry activities.

6. **Is there anything that you'd like to add about your experiences with forestry?**
   Potential Probes:
   When was that?
   Was that before/after a particular event?
   Did you find that simple/difficult?
   Purpose: Ending question that allows respondent to comment on any topic covered in the interview.

Appendix C - Copy of Forestry Service Provider Survey Questions

Business Operations

1. What forestry service do you provide?

2. What best describes your business model?
   - □ sole trader
   - □ business with under 5 employees
   - □ business with over 5 employees
   - □ company
   - □ other, please advise

3. How long have you been providing this forestry service?

4. What are the most common timber species you work with in this area?

5. Do you have any licenses or certifications related to forestry services?

6. How do you access information and/or training about your industry?

7. How do you typically find new work?

8. What best describes local demand for your service?

Local Industry

9. Why do you think demand for your service is increasing/decreasing/stable?

10. What are the main challenges to your industry locally?

11. How has the recent economic climate affected your business?

12. What are the biggest opportunities for growth in the local sector?

13. How important is sustainable forestry practice to your business?

14. What sustainable practices do you currently implement?

15. Are there any local regulations or policies that particularly impact your business?

South East Forestry Hub

16. Are you aware of the South East Forestry Hub?

17. What support can the Forestry Hub offer to support your business?
   □ education/ training
   □ marketing
   □ support with meeting legislation requirements
   □ other, please advise

18. What topics would you be interested in learning more about?
   □ harvesting timber
   □ sustainable forestry practices
   □ weed and pest control
   □ vegetation management / regeneration, rehabilitation, planting
   □ understanding PNF code requirements
   □ timber products, marketing, selling
   □ other, please advise

19. What format would you like information from the Forestry Hub to be in?
   □ webinars / fact sheets to be provided on the forestry hub website
   □ training courses (face to face)
   □ field days
   □ community events

20. Would you like your business and contact details to be available on the South East Forestry Hub website

Appendix D - Full Results of Quantitative Survey

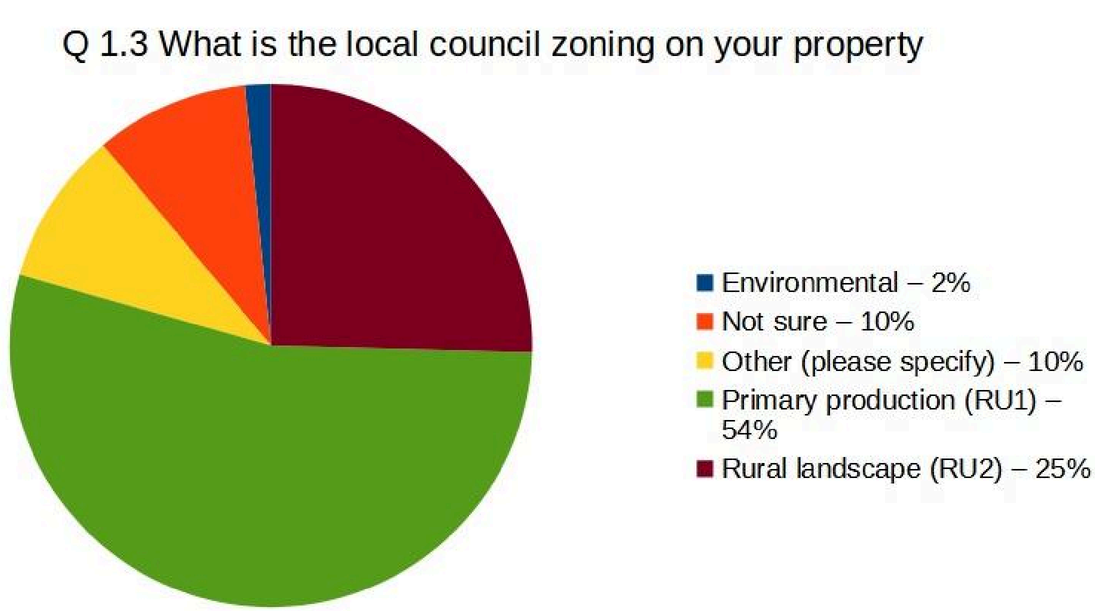
Property Information

<u>Property Area</u>

All respondents barr one answered the question about land size with an average of 83ha and a median of 40ha.

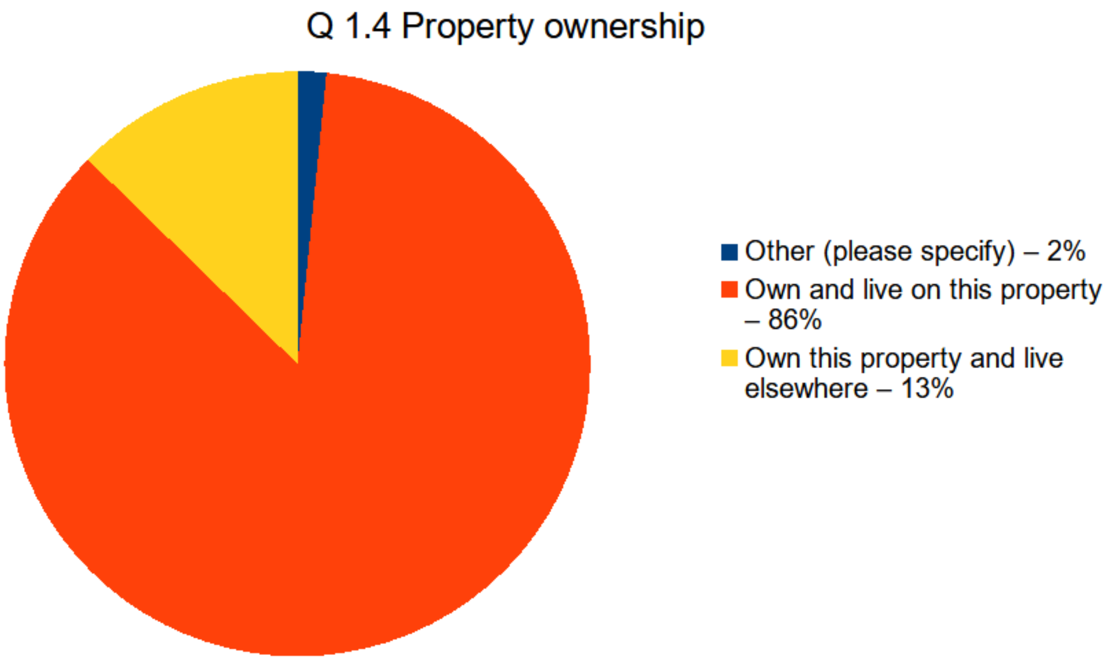
<u>Land zoning</u>

All respondents answered the question about zoning although 6 participants (10%) were unaware of how their land is zoned. Fifty of the respondents, (79%) manage land zoned as primary production (RU1) and rural landscape (RU2). Of those who indicated another zone type, two were in RU5 (village use) while the remaining four had mixed zoning that included C2 (environmental conservation), C3 (environmental management), and RU4 (primary production small lots). See chart below.



<u>Property Ownership</u>

All respondents answered the question about ownership with no responses indicating the property was being rented. The majority of respondents, 54 (86%) own and live on their property with an additional 8 (13%) living elsewhere. Only one response indicating another type of ownership and that was owned by the family of the respondent. See chart below.

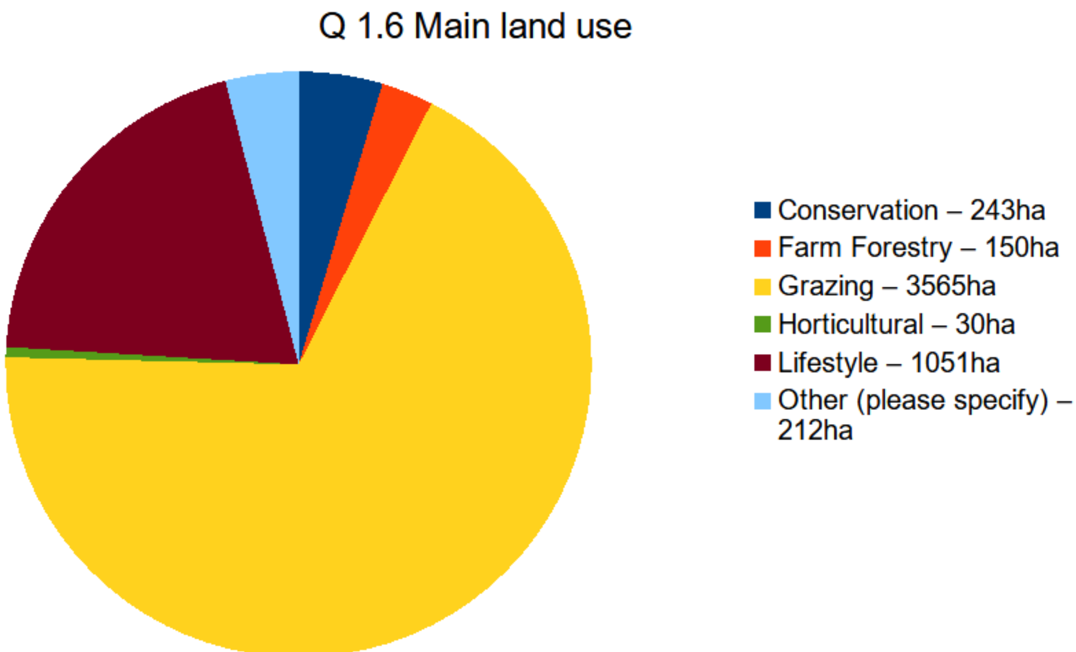


Responses indicated a fairly even spread between lengths of time that people had owned their property.

Length of Ownership	Responses	Percentage
0-5 years	18	29.00%
6-10 years	12	19.00%
11-20 years	18	29.00%
20+ years	15	24.00%

<u>Land Use</u>

Main land use types indicated were grazing by 22 respondents (35%), and lifestyle by 23 respondents (37%) however grazing properties were typically larger than others accounting for a total of 3565ha of land while the next largest land use area was lifestyle with a total of 1051ha. Five respondents felt unable to specify a single land use and chose Other before specifying a combination of residential and other uses. See chart below.



<u>Forests</u>

Respondents were asked to indicate the approximate percentages of their land that was forest, agricultural or other and then give a rough breakdown of forested areas into forest age/type. The average proportion of forest differed according to the main land use specified however there was also a wide range of responses for each land use group (see table below).

People who indicated their main land use was conservation had a high proportion of forest (average 96.6%) while those who indicated lifestyle had less forest (average 45%) and those who mainly conduct grazing had a lower percentage (average 30%).

Main Land Use	Average percentage of forest area	Range in responses of forest area	Total hectares of forest
Conservation	78.00%	45-100%	197
Farm Forestry	36.00%	18-50%	43
Grazing	30.00%	5-80%	1095
Horticultural	10.00%	0-10%	<1
Lifestyle	45.00%	0-90%	660
Other	33.00%	0-90%	21

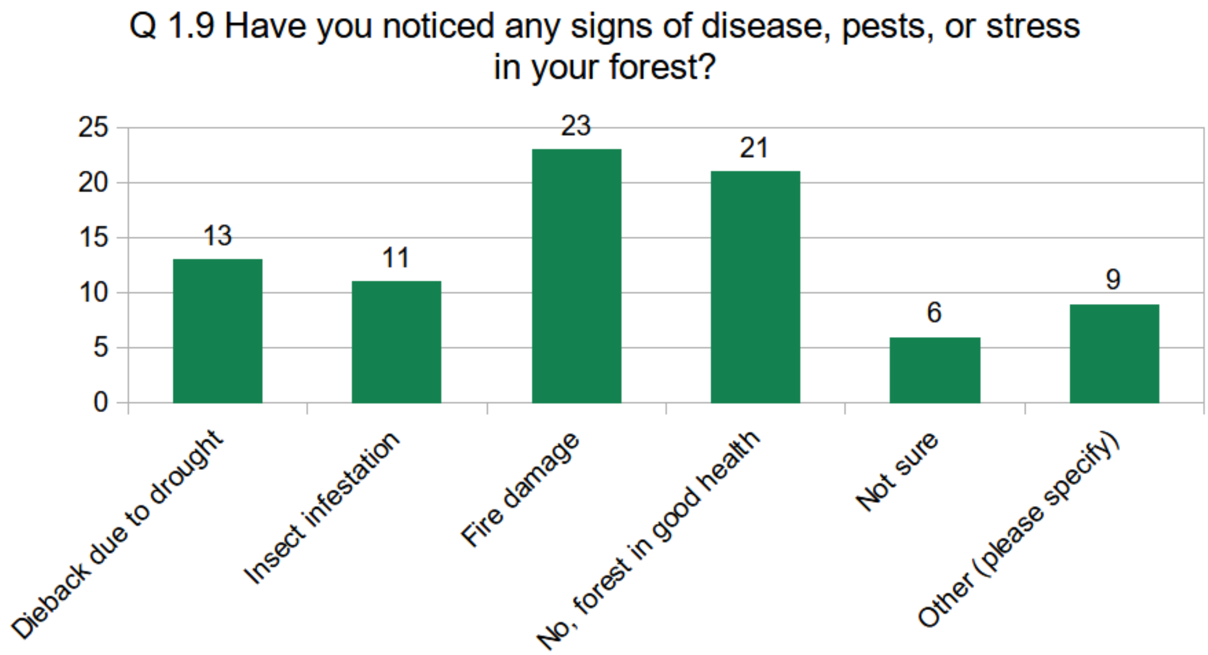
In total, respondents indicated that their properties include approximately 2018ha of forest.

When asked to provide a breakdown of forest types, three respondents (4%) declined to provide a response which accounted for approximately 75ha of forest. The remaining responses are summarised below.

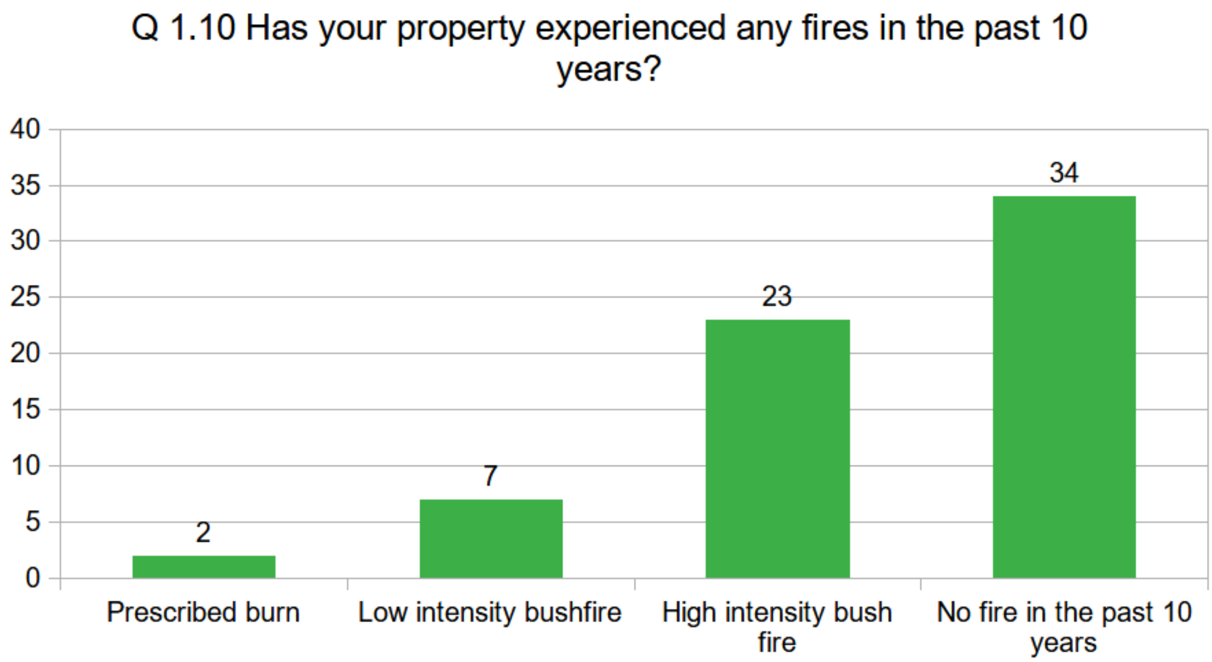
Forest Type	Hectares
Mature native forest (80+ years)	586
Regrowth native forest (30-79 years)	900
Young native forest (0-30 years)	330
Pine (softwood) plantation	1
Eucalypt (hardwood) plantation	19
Other (please specify)	104

Forest Health

The survey asked respondents to indicate if they have noticed any factors that may be causing stress or damage to their forests. Fire damage was the most common response followed by nil issues. Of the nine responses for Other, three listed overcrowding as an issue, See chart below.



During the Black Summer bushfires of 2019/20, 365000ha of land (58% of the total land mass) was burnt in the Bega Valley and the survey attempted to capture how impacted respondents' forests were by asking about fire impact in the past 10 years. Although two respondents (3%) indicated they had conducted prescribed burns, other responses were a fairly even split between low and high intensity bushfires from 30 respondents (48%) and no fire in the past 10 years from 34 respondents (54%) (see table below). People were also asked to indicate when the fire had impacted their forests in the past decade and of the 24 responses to that question, only 2 were not related to Black Summer.

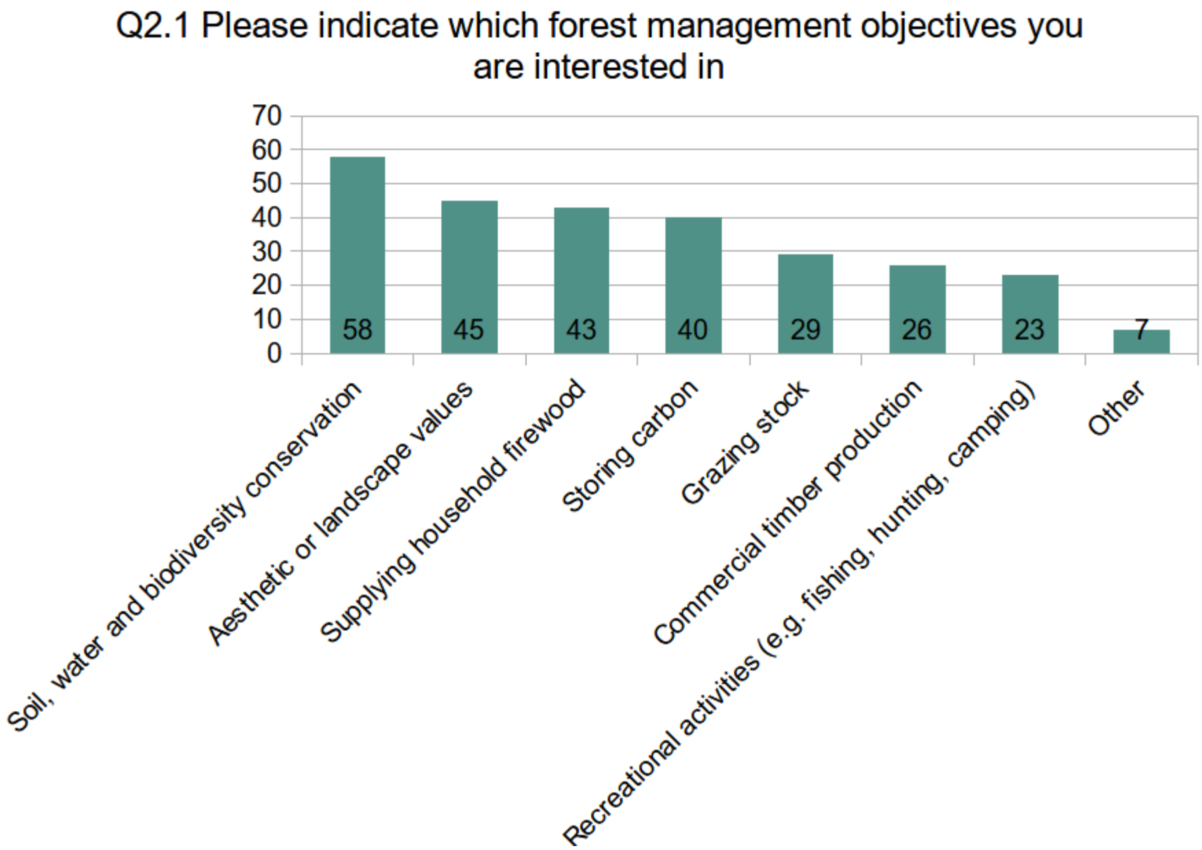


Forest Management

The survey included questions about forest management goals, practices and experience.

All respondents answered all the relevant questions in this section giving an indication of high level engagement with their forests.

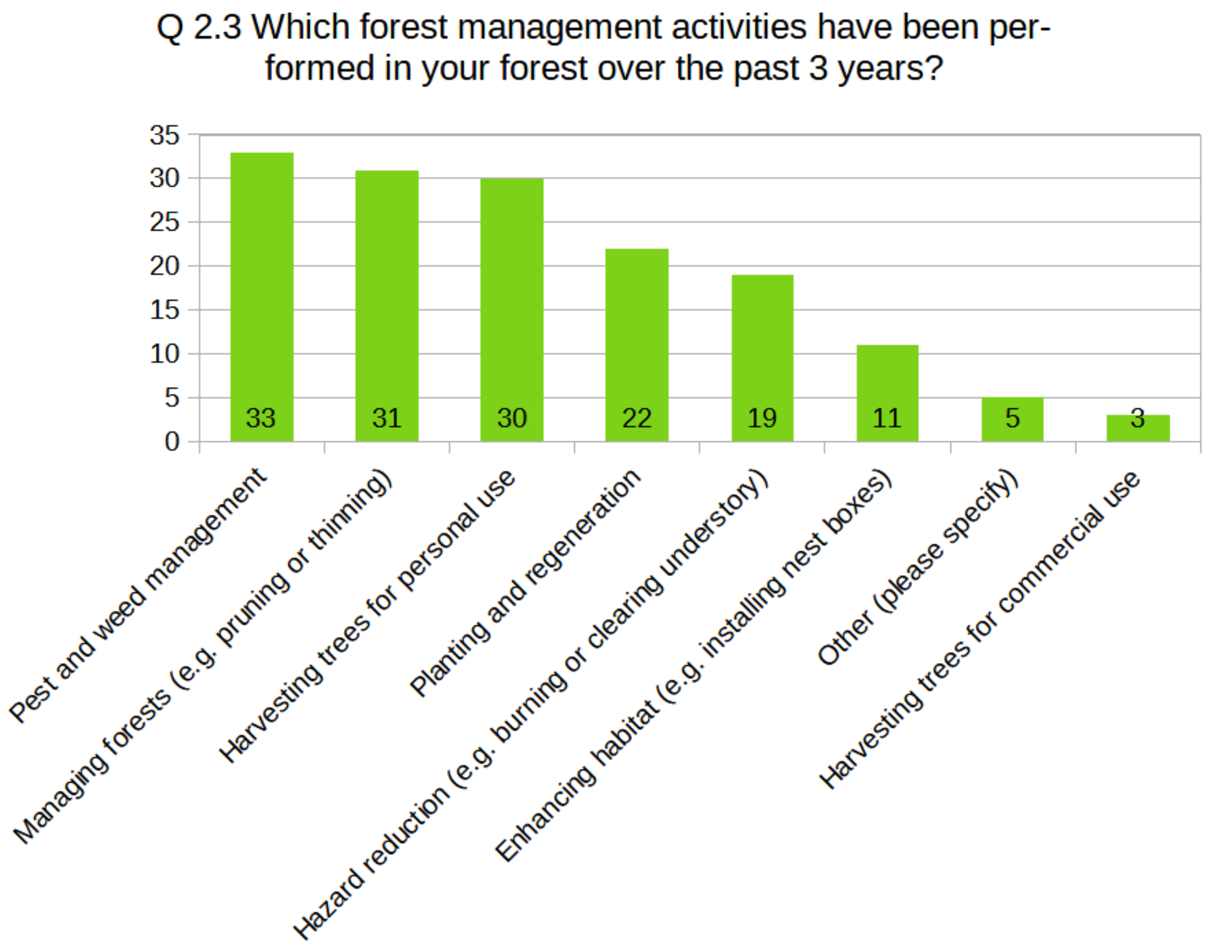
At question 2.1 we wanted to get an understanding of why people are growing forests. Unsurprisingly people have multiple reasons and the average number of responses to this question was over four. Soil, water and biodiversity conservation was a high priority for respondents with 58 responses (92%). Although only 26 respondents (41%) indicated that commercial timber production was of interest, a further 4 respondents answered 'Other' and indicated that small-scale timber production was of interest. See summary of responses from this question below.



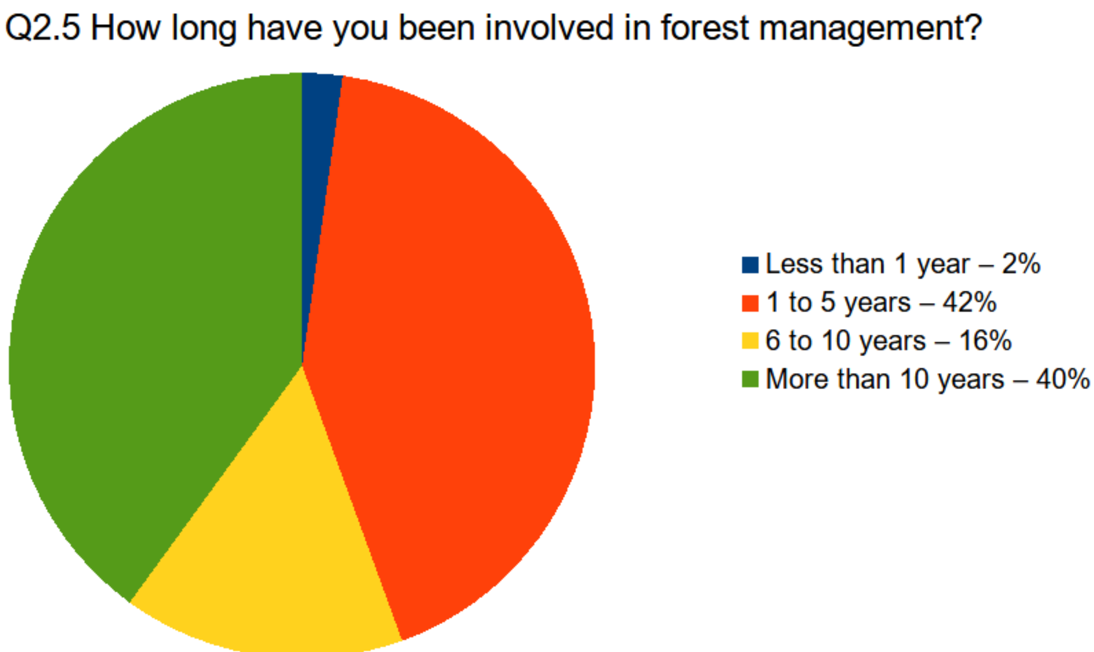
We also wanted to know if people had actively managed their forests in the past 3 years and 46 (73%) indicated they were. Of those that indicated they weren't actively managing/harvesting their forests, the reasons they provided are listed in the table below.

Reasons for not actively managing or harvesting forest	Responses
I don't have enough knowledge to harvest	11
I think it would harm the forest's environmental values	7
I'm interested in biodiversity and/or carbon credits	6
Other	6
I have no financial need to harvest timber	3
I don't believe I can make a financial return on it	3
My forested area is not mature enough to harvest	1

People that were engaged in forest management activity were most likely to undertake pest and weed management followed by pruning and thinning and timber harvesting for own use. Of the responses to Other, exclusion fencing, erosion control, slowing water movement through the landscape, seed collection and site preparation for planting were listed. See chart below for further details.



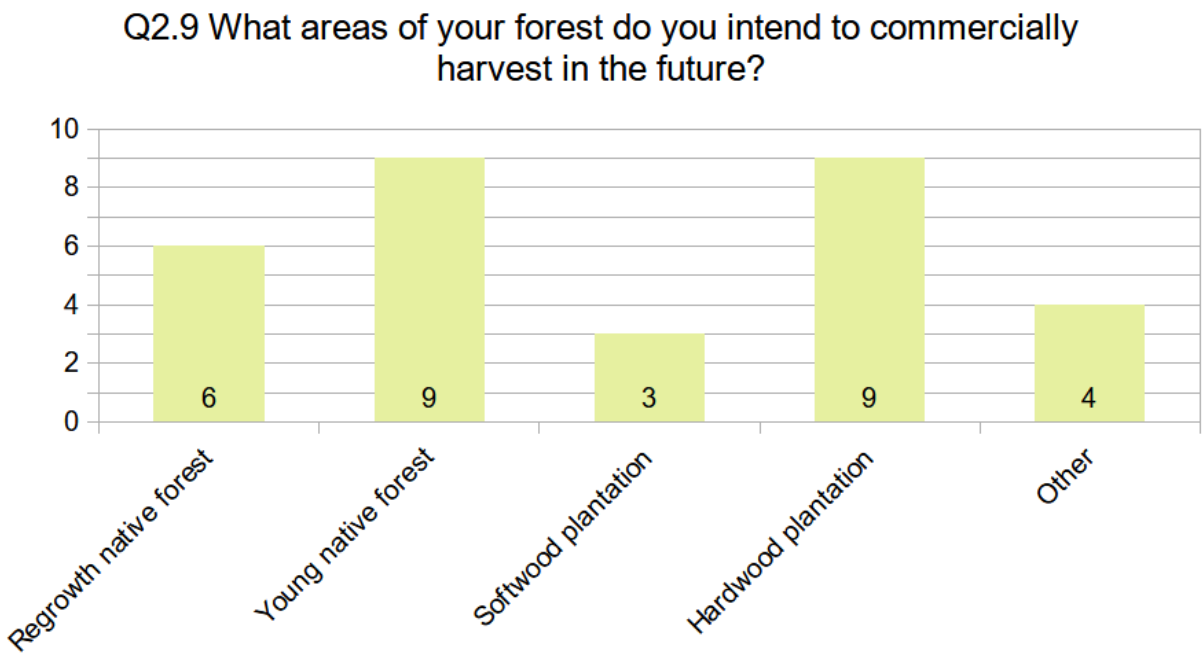
Of the 46 respondents who undertook forest management activities, 41 of these (89%) had completed the majority of their forest management activities themselves; those that didn't undertake the work themselves engaged contractors. Respondents had varying levels of forest management experiences - see below chart.



Only 24 respondents (38% of those surveyed) have engaged in any harvesting activities in the last 3 years - see table below. Of those who indicated Other, responses were for personal use included using mulch from thinnings, firewood for their household, harvesting fodder trees for livestock, harvesting timber for onsite use and burnt tree removal.

Harvest operation type	Responses	Percentage of respondents
Selective harvesting	21	33%
Land clearing	3	5%
Commercial thinning	2	3%
Other	5	8%

Regarding future harvest intentions, 21 of the 46 respondents who were asked intend to commercially harvest in the future.



Private Native Forestry

Two questions asked respondents whether they had a Private Native Forestry (PNF) plan and if not, would they be interested in establishing a PNF plan. Of the 54 people who responded to the first question, only 5 had a PNF plan. In relation to establishing a PNF plan, 47 people responded of which 15 said they would be interested and 24 weren't sure.

Demographics

In the demographics section, respondents were asked about:

- Gender
- Age
- Primary occupation
- Education
- Income
- Succession planning

Responses from this section are tabled below.

Gender

Slightly more males responded to this question (48%) compared to females (38%) with 6% preferring not to say so while forestry has historically been a male dominated area, when it comes to smallscale forestry it seems there are similar levels of participation from both sexes.

Gender	Responses	Percentage of responses
Male	30	48
Female	24	38
Prefer not to say	4	6
No response	5	8

Age

More respondents were aged 45-59 years old (40%) than any other age group however the 60-74 year old age group wasn't far behind (32%). Responses are tabled below.

Age Group	Responses	Percentage of responses
18-29 years	0	0%
30-44 years	9	14%
45-59 years	25	40%
60-74 years	20	32%
75+ years	4	6%
No response	5	8%

Succession planning

A third of participants (21 respondents) indicated that they either did not have a succession plan or were planning for their property to be sold upon their death/retirement.

A third of participants (21 respondents) indicated that they had a succession plan or were working on one while a quarter of participants (16 respondents) had thought about it but not done any planning.

Responses are tabled below.

Succession Planning	Responses	Percentage of responses
No, this property will be sold upon my death/retirement.	9	14%
No, I have not considered succession planning.	12	19%
I've thought about succession, but have no plan.	16	25%
Yes, I'm working on a succession plan.	16	25%
Yes, I have a succession plan in place.	5	8%
No response	5	8%

Occupation

Nearly a third of respondents indicated their main occupation as some form of professional (20 respondents) and almost as many indicated they were retired (19 respondents). Only one respondent indicated their main occupation was a farm forester.

Occupation	Responses	Percentage of responses
Farm forester	1	2%
Grazier/Dairy farmer	8	13%
Other (please specify)	5	8%
Professional (e.g. lawyer, accountant, doctor, teacher, nurse, policeman)	20	32%

Retail/Hospitality	3	5%
Retired	19	30%
Tradesman (e.g. plumber, electrician)	2	3%
No response	5	8%

Education

Participants were asked if they had engaged in education in the field of land management; multiple responses were allowed.

Short courses were the most common form of relevant education participants had undertaken (38% of participants) while 21% had studied at TAFE (or equivalent) and 19% had studied at university. 16% of respondents had participated in more than one form of education and 9% did not select a response.

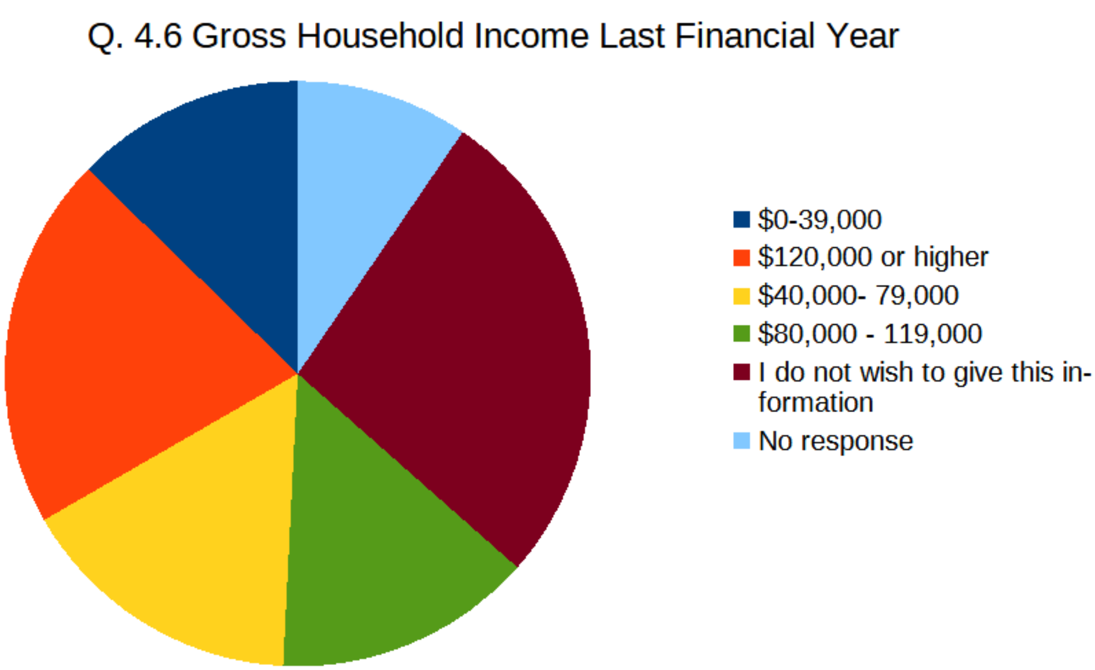
Respondents that indicated Other were an almost equal mix of self-taught, permaculture, LLS courses/field days and professionals in the natural resource management. Responses are tabled below.

Education	Responses	Percentage of respondents
High School	1	2%
TAFE (or equivalent)	14	21%
University	12	19%
Short course	24	38%
Other	8	13%
I do not wish to give this information	3	5%
No response	9	14%

Income

Questions concerning income can be sensitive and nearly a third (32%) of respondents did not indicate gross household income from the last financial year. Of the remaining two thirds of respondents, the highest income bracket accounted for the largest number of respondents (13 or 21%). The other three income brackets were almost equally represented with 8-10 respondents that each accounted for 13-16% of respondents. Results are tabled below.

Gross household income from last financial year	Responses	Percentage of respondents
$0-39,000	8	13%
$40,000- 79,000	10	16%
$80,000 - 119,000	9	14%
$120,000 or higher	13	21%
I do not wish to give this information	17	27%
No response	6	6%



Participants were asked if any of their household income was generated by forestry activities in the past 3 years. Only 9 respondents (14%) indicated that this was the case while 5 people (8%) gave no response.

Appendix E - Full Results of Forest Service Provider Survey

Quantitative questions

The interviews began with 8 quantitative questions to identify the type of forestry service providers in the region, the timbers they most commonly use, how they train their staff and how their business is going. Below are the 8 quantitative questions with a summary of the findings.

Q1. What forestry service do you provide?

Business type	Responses
Production nurseries	4
Arborists	3
Earthworks & vegetation management	5
Timber millers	6
Timber re-sellers	3
Builders & other timber users	3
Firewood supplier	1

Interviewees were classified according to their primary occupation although 32% of respondents (8) provided multiple services.

Q2. What best describes your business model?

Business Type	Responses
Sole trader	10
Business with under 5 employees	3
Business with over 5 employees	6
Company	6

Q3. How long have you been providing this forestry service?

Length of time	Responses
< 2 years	2
2-5 years	4
5-10 years	4
10 - 20 years	3
20+ years	12

While nearly half of the service providers (48%) were well established with over two decades of business, the longevity of business operations was not an indicator of the business type.

Q4. What are the most common timber species you work with in this area?

Timber species	Responses
Yellow stringybark - *E. muelleriana*	7
Silvertop ash - *E. sieberi*	7
Coastal grey box - *E. bosistoana*	3
White stringybark - *E. globoidea*	7
Maiden's gum - *E. maidenii*	3
Spotted gum - *C. maculata*	6
Blackbutt - *E. pilularis*	4
Brown barrel - *E. fastigata*	3
Manna gum/ Ribbon gum - *E. viminalis*	1
Shining gum - *E. nitens*	1
Other	15

Interviewees were able to list multiple species although some providers delivering native vegetation management services responded more generally with 'eucalypts' or 'native undergrowth' rather than specific species.

Commonly found trees that have a good reputation in the area were listed the most often, especially Yellow Stringybark (*E. muelleriana*), White Stringybark (*E. globoidea*) and Silvertop Ash (*E. sieberi*).

Q5. Do you have any licenses or certifications related to forestry services?

Licenses or certifications	Responses
Yes	10
No	15

The majority of service providers are not required to have any specific licences related to forestry services. Those that did indicated a variety of qualifications including:

- Seed collection licence
- Tickets to operate heavy machinery
- Certificate II in sawmilling
- Certificate III in arboriculture

Q6. How do you access information and/or training about your industry?

Information source	Responses
Colleagues	7
TAFE	4
University	0
Industry association	3
Self-taught	11
On-line	6
Forest Corp	1
LLS	1

Interviewees were able to list multiple sources of information.

Q7. How do you typically find new work?

Source of new work	Responses

Word of mouth	20
Social media	2
Advertising	4
Website	3

Interviewees were able to list multiple sources of new work.

Q8. What best describes local demand for your service?

Local demand	Number of responses
Increasing demand	6
Decreasing demand	7
Stable demand	11