

Marketing of forestry and its products: a NSW perspective

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Summary

Marketing, in its broadest sense, is becoming more widely accepted as an essential part of the business of Australian forestry. This paper focuses on marketing strategies for a forest grower, with a brief discussion of generic marketing programs. As marketing strategies are very important to the long-term business of forestry, forest managers have much to gain from an understanding of marketing principles and from being involved in the development of strategies. The success or failure of many of the decisions made by foresters, such as the species selected for a plantation, depends on the longer-term behaviour of the markets for the products of these forests.

Three case studies are described: the development and success of marketing strategies for the NSW cypress sector, the abandonment of the Lithgow Silicon Smelter Project as a major potential market for charcoal-quality hardwood timber on the south coast of NSW, and the Scottish Forestry Strategy, developed following a major collapse of softwood timber prices in the UK.

Major timber-producing countries of the world have now embraced generic timber marketing programs as the way to promote a positive outlook for forestry and timber, and to counter the anti-logging campaigns which have been mounted for many years. In Australia, separate programs for hardwood and softwood are in train.

Keywords: marketing policy; market planning; marketing techniques; cooperative marketing; strategic planning; case studies

Introduction

This paper is about marketing and its application to forestry, with three case studies and a comment on generic marketing of wood. The objective is to enthuse foresters, regardless of role, to become more involved in marketing of the business.

Marketing strategies describe how a major part of the corporate objectives will be achieved. This generally means establishing where an organisation, and its products or services, will be positioned in the marketplace. In simple terms this could mean that the organisation has best-quality products which it sells at the highest price, compared to another organisation which has low to medium-quality products and discounts prices to sell at every opportunity. Organisations may have a number of positions for different markets (for example, sawlogs and pulpwood) or

regions. Strategies are dynamic and may need to be amended in the light of changing circumstances. Each new product needs a new marketing strategy.

In forestry, the review or development of marketing strategies for a discrete part of the business, such as the cypress sector in NSW, requires information from different sources, but is ideally coordinated by the marketing function; for example it will be necessary to:

- have access to reliable estimates of present and future resources, by product/quality and time period, with a modelling capability which can deal with interdependencies, and also information on physical factors such as land availability
- develop a good understanding of all internal factors needed to achieve marketing strategies, including staffing, roads and logging systems, and related costs and profitability
- develop a good understanding of the existing industry, industry associations and customers, particularly the capability for additional volumes or new products
- have a high level of market intelligence for existing and potential markets for the forest products, including a good understanding of competitors and their likely behaviour; actions involve buying reports, conducting surveys, using consultants and keeping a good network of communications with customers and potential customers; and
- develop a good understanding of the social, environmental and political climate at the local, regional and broader scales, which could affect the achievement of the marketing strategy.

When adequate information has been compiled, a creative consultative process is required to sort through the various constraints and opportunities, develop workable options and decide on a marketing strategy.

A marketing strategy may be a neatly-bound comprehensive document, setting out all the background information, assumptions, all intended outcomes and actions to achieve the strategy. Ideally it is widely used by all affected persons. Alternatively, it may be a series of documents targeted to different audiences. A strategy needs to be acknowledged as representing the view of the organisation and preferably the stakeholders. There is little point in having a strategy which has been developed by, say, the marketing group, if other affected groups either do not use it or do not agree with it.

In recent years marketing concepts in the manufacturing and business sector have changed towards a more embracing approach for an organisation. A recent comment on marketing is that:

...the market-oriented organisation understands buyers' needs and wants and effectively combines and directs the skills and resources of the entire organisation to provide high levels of value and satisfaction to its customers. That model of competing, which links R+D, technology, production and finance integrated through marketing's drive to own a market, is an approach that many competitors are now taking. Rather than a specialised function within the organisation, marketing is a central process of the entire business. (Cravens *et al.* 2000)

How might foresters influence decisions that appear to be in the realm of senior marketing executives, CEOs and the government? It is essential to appreciate that any big-picture forestry strategies can be wrong; periodic reviews, including challenges to assumptions, are healthy. Therefore, all parts of the organisation need to be thinking about marketing strategies and contributing in a meaningful way.

Special features of forestry in a marketing context

Marketing courses and textbooks usually focus on traditional businesses with a retail function, such as airlines, motorcars and beer. Forestry marketing is mainly business-to-business and has a special set of features on which I will comment briefly:

The long growing period of trees as a commercial crop, generally at least 15 y and up to 100 y makes forestry different to most businesses. This means that the choice of species for plantations and the regimes used for all forests can have a major impact on the profitability of the business. The expensive decisions are mostly up-front for plantations. Care is needed because any serious mistakes can affect the grower, and dependent industry, for years.

The long value chain applying to timber production — from the allocation of land to forestry, producing logs, sawmilling and value-adding to retailing the products, with many linkages to other products — is unusual in the business world. Forest owners might easily convince themselves that expenditure on marketing and promotion of the end products is not for them. However, there is plenty of evidence that cooperative marketing along the whole value chain can add value to the raw materials.

The environmental debate about forestry has been seen as a point of difference from other industries, but recently other industries have had as many if not more environmental problems than forestry. Experience has shown that, for forestry, such problems can be addressed by generic marketing programs designed to develop positive community attitudes to wood production.

Politics plays a big part in forestry in Australia and requires special attention. There is probably more political effort on forestry, per worker, than in other industries, reflecting the complexity of objectives for forestry from a government point of view. The solution can involve a strategic marketing approach from the industry and growers. The 2004 federal election showed that picking the right political strategy for forestry in Tasmania was quite important.

The dominance of governments as raw material suppliers relates to the point about politics above. The state governments' share of forest production is declining, while that of the private sector is increasing. The popularity of private investor plantation schemes, the privatisation of government plantations in Victoria and possibly NSW, the declining area of public native forest available for harvesting, and an increase in harvesting of private native forests, are all having an impact on governments' share of production.

This paper discusses both successes and failures among forestry initiatives, using three case studies of strategic marketing to demonstrate key points.

The NSW Cypress Industry Strategic Plan (CISP)

The NSW cypress sawmilling industry, the NSW Forest Products Association (FPA) and State Forests NSW (SF) formed a cooperative marketing group. This group developed an initial strategic plan in 1996 (The Cypress Industry Strategic Plan Group 1996) and a second plan in November 2003 (The Cypress Industry Strategic Plan Group 2003). This initiative has been regarded as a success by participants and many others who have been dealing with this sector of the timber industry.

The cypress sector was successful in the 1950s with the post-war housing boom and the popularity of cypress flooring. By 1990 the cypress industry had declined, due largely to the popularity of concrete slab floors and the takeover of the domestic frame and truss market by plantation softwoods. The many small cypress sawmills had no answer to these events and were struggling. SF could not sell all of the available log supply and was making tangible financial losses on managing the forests for timber production. It was not possible for SF to achieve a satisfactory financial performance through cost efficiencies. It was then decided to see whether a cooperative effort with sawmills could result in improved performance and profitability of sawmills, increase the demand for NSW cypress timber, and market all of the sustainable log supply available at prices which allowed SF to operate profitably.

Meetings were arranged with sawmillers, FPA and SF to develop this idea. Initially there was suspicion about motives, but before long all parties became committed to the concept. SF contributed seed funds and consultants were engaged to analyse the sector and advise on a strategic plan which would achieve the basic objectives. Here are some of the key issues at that time.

- There were around 25 independent family-owned cypress sawmills, but more than 80% of the log volume was allocated to nine sawmills. Many of the small mills were producing low-quality products and depressing prices for the sector. There was little communication or cooperation between sawmills, and no strategic marketing direction for the sector.
- Selling prices for cypress were quite low relative to competing products, and millers were quick to discount prices to achieve sales at the expense of rival sawmills.
- Sawmills produced a range of sizes and profiles for standard products, which confused the market.

- Only a handful of sawmills were using kilns and reliable planers to produce flooring; the remainder relied on air-drying with variable results.
- There was no quality assurance scheme for cypress sawmills.
- Sawmill costs were high and management in many cases did not use accounting information to best advantage.

After many meetings of the group, and working with the consultants, the first strategic plan received warm support from the NSW Government and community. The key factors for success identified at that time were:

- development of a culture of cooperation and communication between the sawmills and also with State Forests
- encouragement to sawmills to improve performance, enterprise sustainability and professionalism
- addressing questions of quality management
- improved presentation and promotion of cypress products.

When SF sought tenders for log allocations or when applications for transfers of log allocations were made, SF included more stringent conditions on sawmill performance, relating to the strategic plan objectives, as criteria for decision making. This policy was based on recommendations in the strategic plan, and the policy was supported by most of industry.

The cypress industry became quite enthusiastic about the opportunities for improvement arising from the plan initiative and worked hard to achieve objectives. A number of the small poorer-performing mills sold up or otherwise left the industry, and more than \$13 million was invested on value-adding and improved sawmilling. The group became quite cohesive, to the extent that one member would ask another to assist in filling orders. Groups were formed to export timber, and sharing of information became common. Importantly, foresters in the cypress belt, with a range of roles, were involved in the working group and actively contributed. This appears to be a healthy way for a forestry sector to work.

By the time the second plan was being developed in 2003 the industry was purchasing all available sawlogs, on a sustainable basis, at between 100 000 and 110 000 m³ y⁻¹. Prior to the plan, purchases were around 80 000 m³ y⁻¹.

Significant achievements included adoption of a quality assurance program, which resulted in a higher quality, standardised set of cypress products being sold. Revenue to SF improved considerably. This sector represented itself as a single voice to governments, with assistance from FPA and with community support. The sector became able to minimise effects of any adverse resource decisions by government.

In summary, this case study shows how basic marketing principles were used by a group of sawmillers and foresters to reposition the NSW cypress sector, which became better performing and more profitable. The actions involved cooperation, communication and investment in individual businesses through commitment to a strategic marketing plan.

The NSW Government announced in May 2005 — after this paper was originally prepared for the Institute of Foresters National Conference in Mount Gambier in April 2005 — that

following a lengthy comprehensive review, around one half of state forest land in the Brigalow Belt Southern Bioregion, including a significant part of the cypress forests in the Pilliga region of NSW, was to be transferred into Community Conservation Areas, which will generally not be available for log supply to the timber industry. This transfer has resulted in reductions to cypress sawlog allocations and the closure of a number of smaller cypress sawmills reliant on sawlogs from that area. Government funds have been provided to compensate for the business exit of those affected sawmills. As part of the government's decision it recognised that the cypress sawmilling industry in this area was of a high standard, and it has now provided long-term sawlog supply contracts to remaining sawmills, along with industry development funding.

The NSW Government's decision to transfer state forest to Community Conservation Areas and reduce sawlog allocations to sawmills was generally regarded as unfavourable by the affected businesses and communities. The efforts by the industry to become better performing, more profitable and cohesive over the previous 10 y have been rewarded by the favourable commercial arrangements made by government with the industry since the May 2005 decision, benefiting both those sawmills remaining and those taking business exit. The industry and affected communities can be reasonably satisfied that they did their very best to create a positive future for themselves, but were affected by events beyond their control.

The Lithgow silicon smelter project

Silicon metal manufacturing requires sources of quartz, carbon reductant and economic electric power. Simcoa has a successful plant of this type in Western Australia which uses jarrah for charcoal to make high-quality silicon metal. SF was approached by the NSW Department of Mineral Resources in the late 1990s and became interested in such a development in NSW. The hardwood timber required for the process is of lower quality than that required for sawlogs, and there was an adequate volume available from native forests. SF participated in the promotion of the project, and around 1998 Portmans, a Western Australian mining company, expressed an interest in developing this project in NSW.

The project entailed a quartz mine near Cowra, a silicon metal manufacturing plant at Lithgow, a supply of high-quality charcoal as reductant and additional timber as flux. Power for the Lithgow plant was to be supplied from a local government facility. The project expected to export most of the silicon. A proposed total investment of almost \$100 million and 250 additional jobs were very attractive to government, and once a project plan was developed this became a project of State significance, with announcements about it being made by the Premier.

A false start in the selection of an area to supply timber for charcoal, in the west of the state and adjacent northern tablelands, allowed opponents of the project to mobilise. The State Forests' South Coast Region, which had just completed a Regional Forest Agreement (RFA), was then selected. The company, after considering a number of sites for the charcoal plant, settled on an existing quarry site north of Moruya which was central to the resource, having good transport access and industrial-land zoning.

This project was ideal from a forest management perspective because there were large volumes of timber of low quality (from a sawmilling perspective) which could be generated from existing sawlog harvesting operations approved under the RFA, with a unit stumpage rate similar to that of pulpwood in the area. The market for pulpwood for papermaking in this area was generally restricted to the southern half of the region and longer-term trends indicated that high-density hardwoods could not compete with the expanding volumes of hardwood plantation fibre. The prospect of around 50 additional jobs in logging, log haul and charcoal manufacture was also a large positive for the project.

The NSW Government gave the go-ahead for SF to negotiate a 20-y supply contract for varying volumes in the range 120 000 to 200 000 t y⁻¹ of timber, delivered in log form. The company also committed to a long-term plantation development program, further enhancing the project for government. In 2002 Australian Silicon announced it was preparing an EIS for a proposed charcoal plant.

Opponents of the charcoal plant were well prepared by the time the announcement was made. The original opponents were well informed city-based groups who had long-standing opposition to the logging of publicly-owned native forests and who provided information and support to local groups opposed to logging. Following the announcement of the plant near Moruya the local groups successfully took up the cause by dramatically raising concerns about the plant being a heavy polluting industry not suited to the region. The local community reacted quickly, expressing their concerns in rallies that quickly grew and gained wide television coverage. The anti-project group became the *Charcoalition* and gained public support in Sydney and Canberra. Despite the vocal opposition, the government continued to support the charcoal plant proposal as it was integrally linked to the broader Silicon Smelter Project. After the government approved the charcoal plant EIS, the Charcoalition appealed to the Land and Environment Court to stop the project, but the appeal was not granted.

While the anti-project groups were strongly opposed to the intensification of the logging of native forests, they chose to attack the charcoal plant which was proposed to be located not far from Mogo, a small arts-based community dependent on tourist trade and close to Broulee, a beachside community of retirees and city escapees. Despite the EIS, complaints about truck movements, noise and smoke from the proposed charcoal plant and potential impact on water quality were all raised against the project. The residents of Broulee and Batemans Bay embraced the cause and there was a sense of a small community against the 'big bad industrialised world'. A stalemate developed, where the company was proceeding with its plan, with government support, while the community continued with rallies. At one very large rally the new leader of the State Opposition decided to join the rally and oppose the project, based on his view that the location was inappropriate.

After several months the project was abandoned with a press release citing the main reason as the decision of the State Opposition to oppose the project. The company said that it could not justify continuing with the project in the face of the forthcoming 2003 State election, where one party was opposed to the project. For SF, this decision came as a major market opportunity lost. The company had invested more than \$10 million

in development work. SF and the state government had also made a substantial investment in the project. The Lithgow community was quite disappointed as it was always in favour of the project.

The failure to proceed was no doubt due to a combination of factors. The project relied upon international markets for most of its products, and these could be affected by changing exchange rates. The project also relied upon a long-term source of low-cost power, and the company had not satisfactorily negotiated that power deal with government. Moreover, the company was inexperienced in the forestry sector and had no operations in NSW.

A major weakness of this project was the failure of the proponents to properly engage the south coast community before they became influenced by opponents. This may have meant giving the community a say in the siting of the project and other issues of importance. The project was quite advanced before the community was informed, largely because the proponents felt that the project was sound from an environmental and economic perspective. The intensity of the opposition to the project was a surprise and provided an opportunity for the State Opposition to attempt to make political capital out of the situation.

This outcome showed that a project with good commercial drivers, from a government and forest grower perspective, can fail if weaknesses in the project are not addressed in the early stages. In hindsight, it is important that the company selected for a major project can deliver on its part, and that there is a shared view of how to succeed. Also, for this project, early engagement of the affected community would have been vital to support and success.

The Scottish forestry strategy

In 1971 I visited Scotland and was impressed by the large-scale softwood plantation program around Loch Lomond. In 2000 Scotland, under its devolved charter, developed a forestry strategy through wide-ranging consultation in response to major market issues affecting its softwood plantation resource. I revisited Scotland in September 2004, visited a number of forest areas, met a member of staff of the Forestry Commission and have since followed up with a review of the strategy and current documentation. Because of the magnitude of the problems facing largely plantation-based forest growers, there are some valuable lessons to be learned for Australian foresters. There also appear to be some well-founded initiatives for the Scottish plantation sector, documented in the strategy and subsequent reviews, which could be relevant to Australian foresters.

As at 2003 there were 451 000 ha of state-owned forest and 1 051 000 ha in total of softwood plantation in Scotland, established mostly between 1950 and the present at a relatively uniform rate. Hardwood plantations and regeneration (280 000 ha of broad-leaved forest) are a minor component of the forest estate, and have largely been established since the 1990s.

Objectives of the post-Second World War plantation program were to reforest the landscape, to supply timber to the UK market as a substitute for imports, to enhance rural economies and employment, and to achieve reasonable returns for the forest owner. A principal objective was to establish a strategic reserve of timber to provide wood for the nation in the event of war. This was as a result of the depletion of the nation's woods during the

First and Second World Wars. The Scottish Forestry Grants Scheme was established to promote plantation development. This legacy of grant aid for plantation development has continued to the present.

Following a government review (Zuckerman Committee 1957), forestry policy changed in the late 1950s and the government commenced a program of acquiring marginal farmland for softwood plantations. Government wished to maintain rural communities through employment using lands which were being abandoned by farming. The plantation estate was expanded under this policy, but the industry lacked strategic focus for the next 20–30 y.

During the 1980s the Thatcher government applied its privatisation principles to forestry, and around 100 000 ha of publicly-owned softwood plantation were sold to the private sector at the then high prices, reflecting the relatively high price of timber at that time.

However, in the late 1990s softwood timber prices crashed to around one-half of the peak prices received in 1995, causing a major reduction in stumpage revenue to the Scottish Forestry Commission and private plantation owners. Total timber production is now around 3 million m³ y⁻¹ from state-owned forest and 6 million m³ y⁻¹ when the private sector is included, and these volumes are expected to almost double over the next 20 y. The reduction in timber prices occurred with increased production and imports from the Eastern European bloc, when those countries adopted a free market economy. The price reduction is mainly due to currency conversion rates, particularly the Pound/Euro, but also the Pound/\$US, which have a major impact on the cost of imports.

Scottish structural timber has lower density and strength than that of imported timber, due to faster growth and the prevailing silviculture of the Scottish plantations, with the result that the timber does not have the same market reach as its competitors. However, Scottish fibre for the pulp and paper industry is of very high quality.

The reduction in price has since been assessed as representing a structural shift in prices rather than a short-term price shock (Scottish Executive 2004).

Compared to its competitors, the Scottish plantation industry has high costs of harvesting and transport of timber, and greater regulation in matters such as work time legislation and laden vehicle weights, which add to the problems caused by timber prices.

The UK Forestry Commission, private growers and dependent industries were surprised by the major shift in the European market for softwood and were not well positioned to deal with it, resulting in a severe financial disturbance. The dilemma facing the UK Forestry Commission is that annual income from stumpage (34 million UK pounds) requires a contribution of 26 million pounds (\$AU65 million) from the Scottish Executive to meet costs. Had stumpages remained at the previous and expected higher levels, income would have largely balanced cost (Scottish Executive 2004). However, the 26 million pounds relates to much of the non-timber benefits which the state provides, so is not necessarily a subsidy for the timber side of the industry.

Against this background, new strategic directions have been established (Scottish Executive 2000). The strategy is comprehensive and covers a wide range of issues in a frank and open manner. The five key strategies are:

- maximising the value to the Scottish economy of the wood resource becoming available for harvesting over the next 20 y
- creating a diverse forest resource of high quality that will contribute to the economic needs of Scotland throughout the 21st century and beyond
- ensuring that forestry in Scotland makes a positive contribution to the environment
- creating opportunities for more people to enjoy trees, woods and forests in Scotland
- helping communities benefit from woods and forests.

The strategy is aimed at getting the industry to work together to gain economies of scale, and achieve operational efficiencies and target markets which are best suited to Scottish products. The strategy also proposes that many areas of the estate, uneconomic to harvest under the current price and cost regime, should be used for community benefit, and that hardwoods be planted (some on clearfelled softwood sites) at a rate of 4500 ha in a total of 10 000 ha y⁻¹ to meet the diversity objective.

Selected elements of the strategy relating to timber marketing and industry are outlined here.

To maximise the value of the wood resource

- Improve competitiveness by developing a strong forest industries network.
 - A priority here is to achieve more effective collaborative working.
- Ensure continuing investment in wood processing.
 - Priorities here include promoting opportunities, providing better information on wood availability (including quality) and developing timber marketing groups. The importance of involving private growers in actions that increase confidence in future supplies, including the timber marketing groups, was stressed.
- Develop the timber transport infrastructure.
- Promote more use of timber.
- Develop products that meet market needs.

To create a diverse forest resource for the future

- Expand the area of well-designed productive forest.
- Improve timber quality through good forest practice.
- Develop more mixed forests.
- Exploit non-timber outputs and benefits of woods and forests.

One direction in the 'promote more use of timber' strategy, which is relevant to this discussion, is that:

the key area for growth is the construction timber market where UK sawmillers have 10 percent market share. Capturing an increased market share will mean competing on price, quality and service. In addition to this, there are opportunities to increase the overall size of the market by encouraging more use of timber — as opposed to other building materials. This

potential is illustrated by the fact that about half of the new houses built in Scotland are timber-framed, but in England (the biggest market for Scottish sawnwood) less than 10 percent are timber framed. (Scottish Executive 2000)

This has led to initiation of the UK 'wood, for good' promotional campaign. This is a generic promotional campaign for all parts of the value chain, with a major thrust from the forest grower to address the abovementioned problems.

New figures for 2006 now show UK sawmillers have a 15% market share in construction timber, and 68% of houses built in Scotland and 14% in the rest of the UK are timber framed — which indicates how successful the strategy has been in addressing these market issues and segments.

A further recent development for the Scottish forestry sector and outcome of the Scottish Forestry Strategy has been the evolution and development of the Scottish Forest Industries Cluster, which has supported and encouraged economic development in the rural forestry sector (Coppock 2006).

Australian foresters are urged to review this case study, documented on the web, for ideas on how to address a major problem of market position for a large-scale forest grower.

Generic marketing of timber

The forest sectors of the developed nations have now realised that to succeed in the future, with intense competition for continued use of forested land, anti-logging activism and competition for market share within established and potential markets, a new approach is needed. This new approach is generic promotion using well-researched campaigns involving television advertising (Jaakko Poyry 2004).

For example, a campaign was run by the North American Wood Promotion Network, under the 'Be Constructive' banner with a budget of around \$US45 million over 3 y from 2000. Another example is the UK 'Wood for Good' campaign mentioned above. The Canadians have a 'Wood Works' campaign and in Australia two campaigns are current: 'Wood Lives On' for hardwoods, and 'Plantation Pine: A better living environment'.

State Forests (now Forests NSW) is a participant in both of these Australian marketing campaigns. I believe it is important for all parts of the value chain to support them.

Conclusions

I have shown that good marketing strategies should involve all parts of an organisation and include effective communication and consultation with external stakeholders. I urge foresters, particularly those in forest management, to study marketing principles and become involved in the discussions and setting of strategies.

For the cases described above:

- The NSW cypress industry was in trouble and its re-ignition was based on a cooperative marketing program

between sawmillers, industry associations and the forest grower. While this industry has now been affected by a government decision in 2005 which transferred forest to Community Conservation Areas and reduced sawlog allocations, the industry can be reasonably satisfied that it did the very best to create a positive future, but was affected by events beyond its control.

- The Lithgow Silicon Smelter Project shows that a forestry project with good market drivers can still fail if weaknesses are not addressed in the early stages and attention is not given to all key stakeholders.
- The Scottish case shows the importance of changing market situations and the need to periodically review strategies for marketing a large resource. The strategic response to these problems is a valuable contemporary source of ideas for Australian forestry.

The case for well-planned generic marketing campaigns for forestry and timber has never been stronger, and all people in the industry, particularly foresters, should support and become involved in them.

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