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About this report

ABARES has prepared this report under the auspices of the National Plantation Inventory (NPI)—a programme that has collected data and reported on plantations established primarily for wood production in Australia since 1993.

The Australian plantation statistics update is published every year. It complements the five-yearly comprehensive spatial stocktake of Australia's industrial plantation estate, the last of which was published in 2011 (Gavran & Parsons 2011). Annual updates support strategic forest industry planning and decision-making by presenting information on total plantation area, new planting and ownership.

In this report, 2012–13 data are compared with data from the five-yearly comprehensive spatial reports for 2004–05 and the 2000–01 and 2011–12 annual updates.

In this report plantation areas are presented by NPI regions (Map 1) for softwood and hardwood plantation types, species, and by jurisdiction, based on data collected from private growers and grower representatives, and state and territory agencies. The survey that underpins this report collects information on the total plantation estate and newly established plantations on land not previously used for plantations. Plantations are added if they have not been previously recorded, revised if earlier data were in error, and removed from the inventory if plantations have been converted to another agricultural land use.

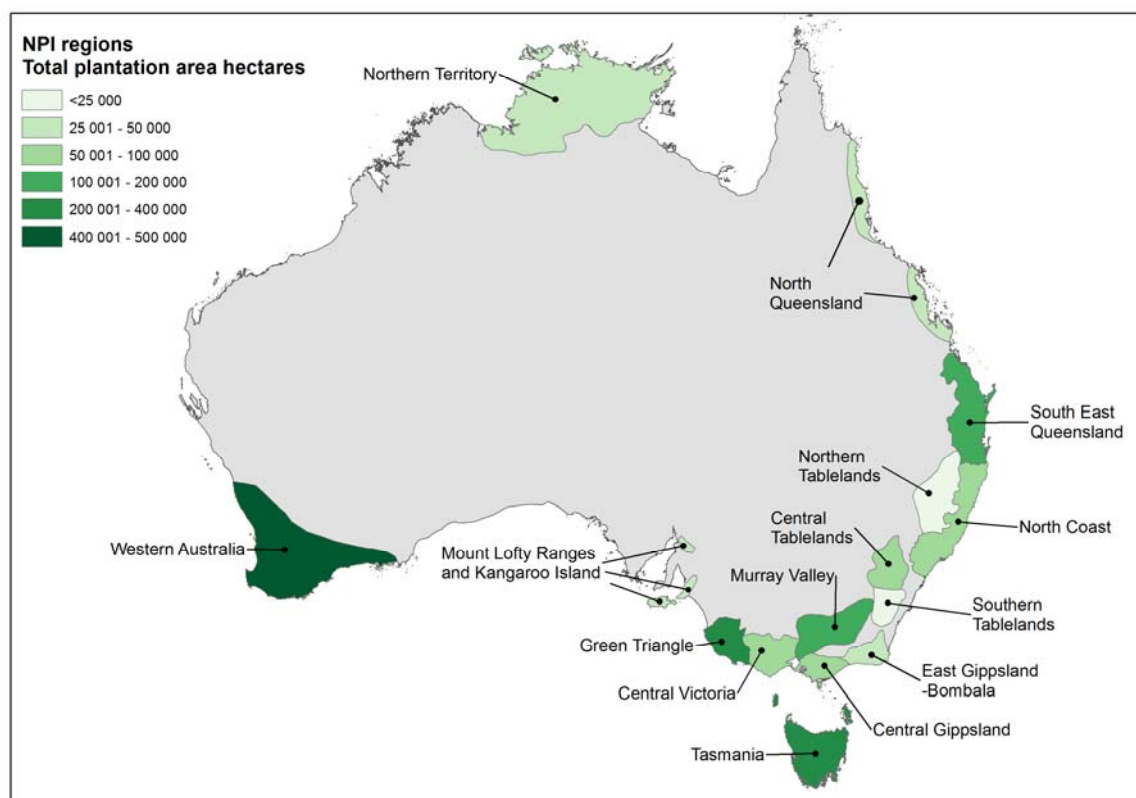
A substantial area of plantations is harvested each year and some areas are not replanted. Replanting might not take place for some time after harvesting (fallow land) so unless advised of a change in land use, the NPI records such fallow land as plantation. Although all care is taken to reconcile data, discrepancies may occur in the area reported from year to year.

Individual grower information submitted to the NPI is confidential. For reporting purposes, data from individual growers are aggregated within regions or states and territories and are not provided individually to other parties without the consent of the data owner.

The data presented in this report do not capture all small-scale and farm forestry plantings, but do include farm forestry plantings that were reported in *Australian plantation statistics 2011* (Gavran & Parsons 2011).

This report complements two other NPI information products published by ABARES: the five-yearly comprehensive spatial stocktake of Australia's industrial plantation estate and the five-yearly comprehensive log supply forecast report. Data collated by the National Plantation Inventory are subsequently reported in other national publications, including the ABARES *Australian forest and wood products statistics*, *Australia's State of the Forests Report* and the Australian Bureau of Statistics *Year Book Australia*.

Map 1 National Plantation Inventory regions



Source: ABARES

Summary

Australia's total plantation estate remained stable in 2012–13, with a total of 2 012 500 hectares reported by plantation managers compared with 2 012 600 hectares in 2011–12.

In 2012–13 the total area of softwood plantations was 1 023 800 hectares; the total area of hardwood plantations was 976 400 hectares; and around 12 300 hectares was classified as other categories that included mixed hardwood and softwood species and plantations where species type was not reported.

About 2200 hectares of new plantation areas were reported to be established in 2012–13. This is the smallest area of new plantations established since the mid-1990s. The increase was offset by removal of existing plantation areas of around 2300 hectares that growers either deemed commercially unviable or did not replant at the end of their lease agreement.

Removals of some plantation areas from active production are expected to continue over the next five years as some lease agreements reach completion and commercially unviable plantations are not replanted.

Between 2000–01 and 2012–13 the new plantation establishment rate declined in all states and territories except the Northern Territory.

From 2011–12 to 2012–13 the plantation estate has increased or remained unchanged in every National Plantation Inventory (NPI) region except Western Australia and Central Gippsland. The plantation area declined by around 0.55 per cent in Western Australia and by 1.05 per cent in Central Gippsland. The largest increase from 2011–12 to 2012–13 of 4.16 per cent was in the Northern Territory.

The hardwood plantation estate is dominated by blue gum (54.6 per cent) and shining gum (24.2 per cent). Both species are primarily managed for pulplog production.

The softwood plantation estate is dominated by radiata pine (75.4 per cent) and southern pines (14.8 per cent). Both species are primarily managed for sawlog production.

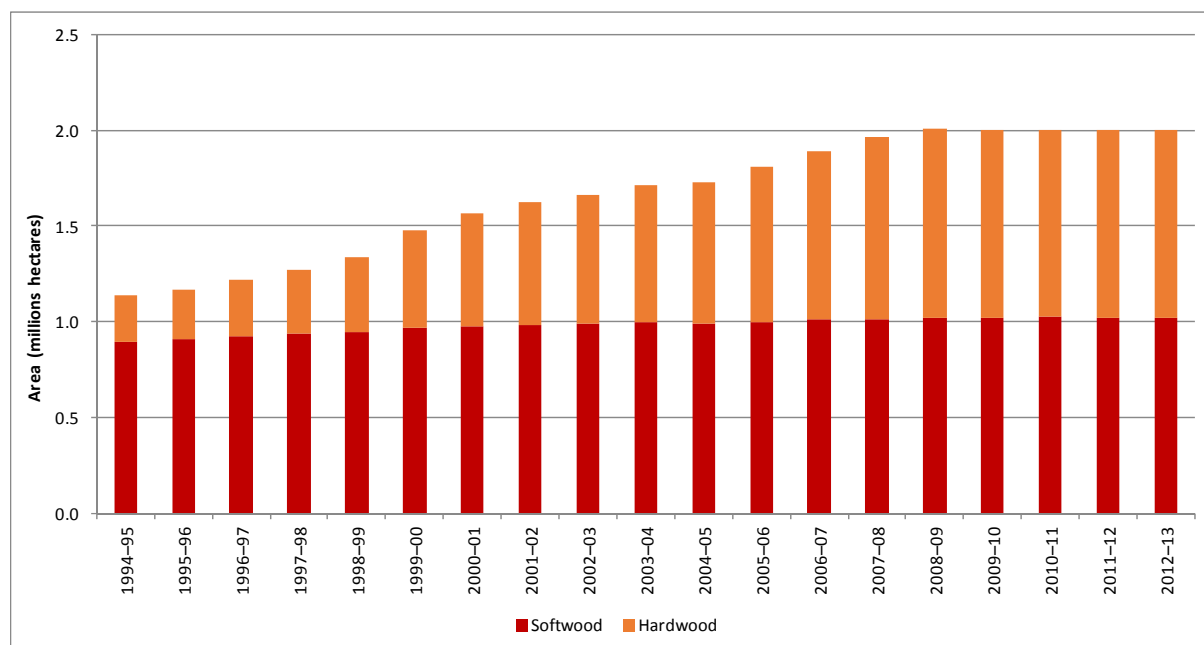
In 2012–13 plantations produced 82.7 per cent of the total wood supply from Australian forests.

1 Characteristics of the plantation estate

Total plantation estate

Australia's total plantation estate was around 2 012 500 hectares in 2012–13, as reported by plantation managers (Figure 1), and has remained stable for the past five years.

Figure 1 Total Australian plantation area, by type, 1994–95 to 2012–13



Note: 1994–95 to 2004–05 are calendar years and 2005–06 to 2012–13 are financial years.

Source: ABARES

In 2012–13 the total area of softwood plantations was 1 023 800 hectares and the total area of hardwood plantations was 976 400 hectares, 0.03 per cent less than in 2011–12 (Table 1). In 2012–13 hardwood plantations accounted for 49 per cent of all plantations, compared with 43 per cent in 2004–05.

Between 2011–12 and 2012–13 the total plantation area increased in the Northern Territory and decreased slightly in Western Australia and Victoria. The other states and territories showed minor increases or remained unchanged (Table 2). From 2011–12 to 2012–13 the plantation estate has increased or remained unchanged in every National Plantation Inventory (NPI) region except Western Australia and Central Gippsland. The plantation area declined by around 0.55 per cent in Western Australia and by 1.05 per cent in Central Gippsland. The largest increase from 2011–12 to 2012–13 of 4.16 per cent was in the Northern Territory (Table 3).

Table 1 Overview of Australia's plantation estate, 2000–01, 2004–05, 2011–12 and 2012–13

Overview of total plantation area	2000–01 (’000 ha)	2004–05 (’000 ha)	2011–12 (’000 ha)	2012–13 (’000 ha)	Change between 2000–01 and 2012–13 (%)	Change between 2004–05 and 2012–13 (%)	Change between 2011–12 and 2012–13 (%)
Hardwood	587.9	740.2	976.7	976.4	66.08	31.91	–0.03
Softwood	979.6	990.0	1 023.6	1 023.8	4.52	3.42	0.02
Other categories ^a	1.4	9.3	12.3	12.3	778.57	32.26	0.00
Total	1 568.9	1 739.5	2 012.6	2 012.5	28.28	15.69	0.00

^a Other categories are mixed hardwood and softwood species and plantations for which species was not reported.

Note: 2000–01 and 2004–05 are calendar years and 2011–12 and 2012–13 are financial years. All columns and rows have been rounded so column totals may not tally.

Source: ABARES

Table 2 Plantation area by states and territories, Australia, 2000–01, 2004–05, 2011–12 and 2012–13

Plantation area by state/territory	2000–01 (’000 ha)	2004–05 (’000 ha)	2011–12 (’000 ha)	2012–13 (’000 ha)	Change between 2000–01 and 2012–13 (%)	Change between 2004–05 and 2012–13 (%)	Change between 2011–12 and 2012–13 (%)
New South Wales	324.3	331.6	391.9	392.2	20.93	18.26	0.07
Victoria	345.1	384.6	433.6	433.5	25.63	12.73	–0.01
Queensland	201.4	225.6	233.3	233.4	15.90	3.47	0.05
South Australia	143.2	167.0	188.5	188.5	31.64	12.88	0.01
Western Australia	337.3	377.6	405.1	402.9	19.44	6.70	–0.55
Tasmania	195.2	227.2	310.7	310.7	59.19	36.77	0.01
Northern Territory	7.7	16.3	41.8	43.5	465.43	167.10	4.16
Australian Capital Territory	14.7	9.5	7.7	7.7	–47.62	–18.95	0.00

Note: 2000–01 and 2004–05 are calendar years and 2011–12 and 2012–13 are financial years.

Source: ABARES

Table 3 Plantation area by region, Australia, 2000–01, 2004–05, 2011–12 and 2012–13

Plantation area by region a	2000–01 (’000 ha)	2004–05 (’000 ha)	2011–12 (’000 ha)	2012–13 (’000 ha)	Change between 2000–01 and 2012–13 (%)	Change between 2004–05 and 2012–13 (%)	Change between 2011–12 and 2012–13 (%)
Western Australia	337.3	377.6	405.1	402.9	19.44	6.70	–0.55
Northern Territory	7.7	16.3	41.8	43.5	465.43	167.10	4.16
Mount Lofty Ranges and Kangaroo Island (South Australia)	20.9	28.8	34.1	34.1	63.02	18.28	0.00
Green Triangle (South Australia/Victoria)	252.3	298.8	348.1	348.1	37.98	16.50	0.00
North Queensland	29.2	29.3	38.4	38.4	31.50	31.05	0.00
South East Queensland	169.3	193.8	194.4	194.4	14.78	0.28	0.00
Northern Tablelands New South Wales	16.5	17.5	24.4	24.4	47.53	39.71	0.00
North Coast New South Wales	59.2	66.6	101.0	101.0	70.57	51.57	0.00
Central Tablelands New South Wales	80.6	80.4	82.1	82.4	2.26	2.52	0.36
Southern Tablelands New South Wales	26.6	22.2	22.1	22.1	–17.03	–0.75	0.00
Murray Valley (New South Wales/Victoria)	180.1	184.6	195.3	195.3	8.47	5.80	0.00
Central Victoria	54.3	57.2	68.5	68.8	26.51	20.23	0.44
Central Gippsland (Victoria)	90.1	92.9	96.0	95.0	5.38	2.20	–1.05
East Gippsland–Bombala b (Victoria/New South Wales)	45.1	46.1	51.5	51.5	14.30	11.79	0.00
Tasmania	195.2	227.2	310.7	310.7	59.19	36.77	0.01

a Locations of the regions listed are shown in Map 1. **b** Provisional data.

Note: 2000–01 and 2004–05 are calendar years and 2011–12 and 2012–13 are financial years.

Source: ABARES

State and territory highlights

In 2012–13 Victoria had the largest area of plantations, followed by Western Australia and New South Wales (Table 4). Western Australia had the largest area of hardwood plantations and New South Wales the largest area of softwood plantations.

Table 4 Plantation areas, by state and territory, 2012–13

State/territory	Hardwood (’000 ha)	Softwood (’000 ha)	Other (’000 ha)	Total (’000 ha)
New South Wales	93.0	296.5	2.7	392.2
Victoria	206.5	225.9	1.1	433.5
Queensland	41.5	189.4	2.5	233.4
South Australia	59.7	128.5	0.3	188.5
Western Australia	298.9	98.3	5.7	402.9
Tasmania	235.6	75.1	0.0	310.7
Northern Territory	41.1	2.4	0.0	43.5
Australian Capital Territory	0.0	7.7	0.0	7.7
Total	976.4	1 023.8	12.3	2 012.5

Note: All columns and rows have been rounded, so totals may not tally.

Source: ABARES

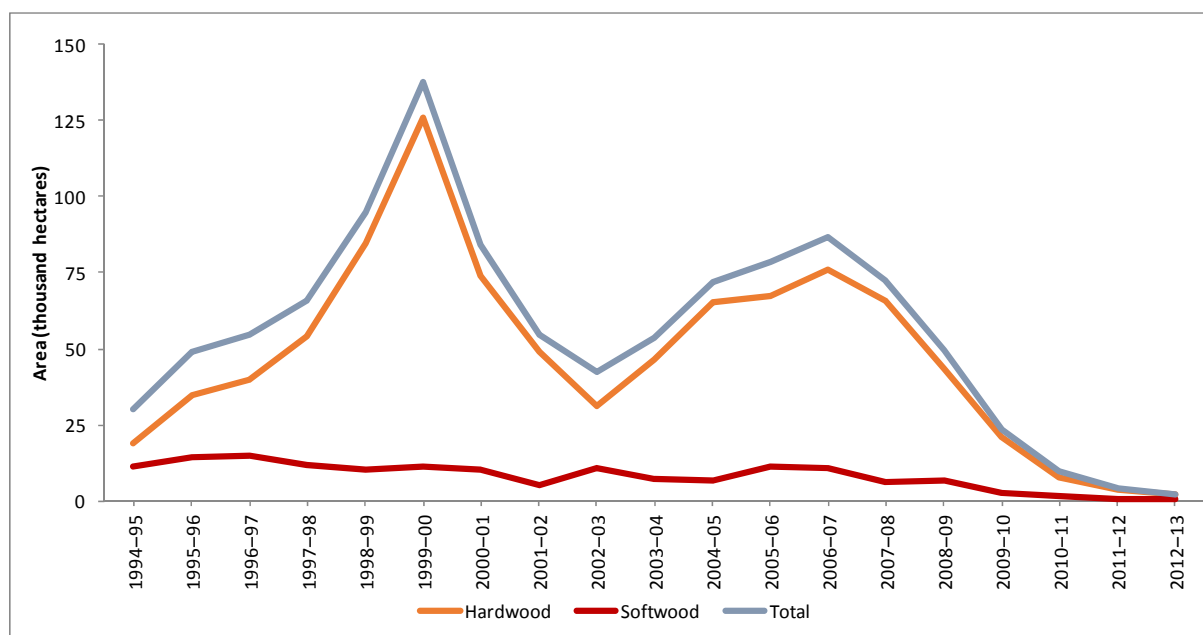
New plantations

New plantations are those established on land not previously used for plantation forestry. About 2200 hectares of new plantation areas were reported as being established in 2012–13 (Figure 2). This increase was offset by the removal of 2300 hectares of existing plantation area that growers either deemed commercially unviable or did not replant at the end of their lease agreement. Therefore, there was a net decrease in plantation area of around 100 hectares in 2012–13.

Removals of some plantation areas are expected to continue over the next five years as some lease agreements end and commercially unviable plantations are not replanted. Projected reductions in the future plantation area is based on the ABARES 2014 plantations survey and information collected by ABARES at forestry sector stakeholder workshops in March 2013.

Managed investment schemes funded 13 per cent of new plantations established in 2012–13; institutional investors funded 83 per cent; timber industry companies 1 per cent; farm foresters and other private owners 3 per cent.

Figure 2 New plantations, 1994–95 to 2012–13



Note: 1994–95 to 2004–05 are calendar years and 2005–06 to 2012–13 are financial years.

Source: ABARES

Between 2000–01 and 2012–13 the new plantation establishment rate declined in all states and territories except the Northern Territory (Table 5).

Table 5 New plantation areas, 2000–01, 2004–05, 2011–12 and 2012–13

State/territory	2000–01 (’000 ha)	2004–05 (’000 ha)	2011–12 (’000 ha)	2012–13 (’000 ha)	Change between 2000–01 and 2012–13 (%)	Change between 2004–05 and 2012–13 (%)	Change between 2011–12 and 2012–13 (%)
New South Wales	3.89	7.36	0.36	0.26	–93.3	–96.4	–27.1
Victoria	26.47	10.91	1.05	0.02	–99.9	–99.8	–97.7
Queensland	9.44	9.67	0.81	0.12	–98.7	–99.8	–85.2
South Australia	7.34	6.05	0.00	0.01	–99.9	–99.8	0.0
Western Australia	21.58	22.37	0.36	0.02	–99.9	–99.9	–95.2
Tasmania	14.95	10.00	0.06	0.04	–99.7	–99.6	–28.5
Northern Territory	0.74	5.67	1.56	1.74	134.9	–69.3	11.4
Australian Capital Territory	0.00	0.00	0.00	0.00	0.0	0.0	0.0
Total	84.42	72.03	4.19	2.22	–97.4	–96.9	–47.1

Note: New plantations are those established on land not previously used for plantation forestry. 2000–01 and 2004–05 are calendar years and 2011–12 and 2012–13 are financial years. All columns and rows have been rounded, so totals may not tally.

Source: ABARES

From 2004–05 to 2012–13, establishment of new plantations declined by around 64 000 hectares (97.1 per cent) for hardwoods, and by more than 6000 hectares (95.0 per cent) for softwoods (Table 6).

Table 6 New plantations established, Australia, 2000–01, 2004–05, 2011–12 and 2012–13

New plantations established^a	2000–01 (’000 ha)	2004–05 (’000 ha)	2011–12 (’000 ha)	2012–13 (’000 ha)	Change between 2000–01 & 2012–13 (%)	Change between 2004–05 & 2012–13 (%)	Change between 2011–12 & 2012–13 (%)
Hardwood	74.2	65.6	3.5	1.9	–97.4	–97.1	–46.4
Softwood	10.2	6.5	0.7	0.3	–96.9	–95.0	–50.9

^a New plantations are those established on land not previously used for plantation forestry.

Note: 2000–01 and 2004–05 are calendar years and 2011–12 and 2012–13 are financial years.

Source: ABARES

Plantation ownership

In 2012–13 private plantations increased from 1 485 000 hectares in 2011–12 to around 1 561 300 hectares, 77.6 per cent of the total plantation estate, mainly because of the purchase of Forestry South Australia’s plantation estate. Public plantations accounted for 18.8 per cent and jointly owned (public and private) plantations represented 3.6 per cent of the total plantation estate (Table 7).

New South Wales had the largest share of Australia’s total public plantations (64.9 per cent); Victoria had the largest share of Australia’s total private plantations (27.4 per cent); and Western Australia accounted for most of Australia’s total jointly managed plantations (60.1 per cent) (Table 7).

Table 7 Total plantation area, by states and territories and ownership, 2012–13

State/territory	Unit	Joint^a	Private	Public	Total
New South Wales	’000 ha	5.8	140.9	245.5	392.2
Victoria	’000 ha	0.2	428.2	5.0	433.5
Queensland	’000 ha	0.1	233.3	0.0	233.4
South Australia	’000 ha	0.0	174.3	14.1	188.5
Western Australia	’000 ha	43.9	288.1	70.9	402.9
Tasmania	’000 ha	23.1	253.0	34.7	310.8
Northern Territory	’000 ha	0.0	43.5	0.0	43.5
Australian Capital Territory	’000 ha	0.0	0.0	7.7	7.7
Total	’000 ha	73.1	1 561.3	378.1	2 012.5
Proportion of tree ownership	%	3.6	77.6	18.8	100.0

^a Includes some small areas for which ownership details were not reported.

Note: All columns and rows have been rounded so column and row totals may not tally.

Source: ABARES

Between 2011–12 and 2012–13, the proportion of plantations owned by institutional investors increased by eight percentage points to 40 per cent of all plantations. This was a result of growing rights (right to harvest trees) being transferred from managed investment scheme plantations and Forestry South Australia’s plantation estate (Table 8). The proportion of plantations owned by managed investment schemes decreased by three percentage points in 2012–13 to 20 per cent of all plantations. These figures do not account for any purchases of plantations in 2013–14.

Table 8 Plantation ownership, 2004–05, 2011–12 and 2012–13

Plantation owner	2004–05 (%)	2011–12 (%)	2012–13 (%)
Institutional investors	12	32	40
Timber industry companies	15	13	13
Farm foresters and other private owners	13	8	8
Managed investment schemes	23	23	20
Governments	37	24	19

Note: 2004–05 is a calendar year and 2011–12 and 2012–13 are financial years. Joint venture plantations are not included.

Source: ABARES

Major plantation species

Hardwood plantation species

The hardwood plantation estate is dominated by southern blue gum (54.6 per cent) and shining gum (24.2 per cent), both of which are primarily managed for pulplog production (Table 9). These proportions are similar to those reported in previous years. Most southern blue gum plantations are in Western Australia and the Green Triangle, while most shining gum plantations are in Tasmania. Dunn's white gum is primarily managed for pulplog production in South East Queensland and managed for sawlog and pulplog production in the North Coast New South Wales region.

Blackbutt and flooded gum (2.7 per cent) and spotted gum are primarily managed for sawlog production. Most blackbutt, flooded gum and spotted gum are in the North Coast New South Wales region.

Softwood plantation species

The softwood plantation estate is dominated by radiata (75.4 per cent) and southern pines (14.8 per cent); both are managed for sawlog production (Table 10). These proportions are similar to those reported in previous years. Most radiata pine plantations are in the Murray Valley, Green Triangle, Central Tablelands New South Wales and Tasmania. Most southern pine plantations are in the South East Queensland region. Other regionally important softwood species are maritime pine in Western Australia and hoop pine in South East Queensland.

Table 9 Major hardwood species, by region, 2012–13

Region	Unit	Blue gum	Blackbutt/ flooded gum	Shining gum	Spotted gum	Dunn's white gum	Other eucalypts	Other species	Total
Western Australia	'000	275.0	0.0	0.0	1.0	0.0	22.3	0.7	298.9
Northern Territory	'000	0.0	0.0	0.0	0.0	0.0	0.0	41.1	41.1
Mount Lofty Ranges and Kangaroo Island (South Australia)	'000	12.4	0.0	0.0	0.3	0.0	1.4	0.1	14.2
Green Triangle (South Australia/Victoria)	'000	171.1	0.0	0.0	0.0	0.0	0.2	0.1	171.4
North Queensland	'000	0.0	1.0	0.0	0.9	1.2	4.4	2.7	10.2
South East Queensland	'000	0.0	2.5	0.0	6.1	18.7	3.5	0.4	31.2
Northern Tablelands, New South Wales	'000	0.0	0.2	5.3	0.2	0.0	1.1	0.0	6.9
North Coast, New South Wales	'000	0.7	22.1	3.8	13.2	27.4	10.8	5.0	83.1
Central Tablelands, New South Wales	'000	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3
Central Victoria	'000	33.2	0.0	2.5	0.0	0.0	1.7	0.1	37.5
Southern Tablelands, New South Wales	'000	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.4
Murray Valley (New South Wales/Victoria)	'000	5.7	0.0	0.6	0.0	0.0	0.6	0.0	6.9
Central Gippsland (Victoria)	'000	14.2	0.0	11.0	0.0	0.0	7.6	0.0	32.8
East Gippsland–Bombala a (Victoria/New South Wales)	'000	0.5	0.0	4.6	0.0	0.0	0.6	0.0	5.7
Tasmania	'000	20.4	0.0	208.4	0.0	0.0	0.5	6.3	235.6
Total	'000	533.1	25.9	236.2	21.8	47.4	55.0	57.0	976.4
Proportion of hardwood species	%	54.6	2.7	24.2	2.2	4.9	5.6	5.8	100.0

a Provisional data. Unknown plantations are not included.

Note: All columns and rows have been rounded, so totals may not tally. 2000–01 and 2004–05 are calendar years and 2011–12 and 2012–13 are financial years.

Source: ABARES

Table 10 Major softwood species, by region, 2012–13

Region	Unit	Radiata pine	Southern pines	Maritime pine	Hoop pine	Other pines	Other species	Total
Western Australia	'000 ha	56.4	0.0	41.7	0.0	0.3	0.0	98.3
Northern Territory	'000 ha	0.0	2.4	0.0	0.0	0.0	0.0	2.4
Mount Lofty Ranges and Kangaroo Island (South Australia)	'000 ha	19.4	0.0	0.3	0.0	0.2	0.0	20.0
Green Triangle (South Australia/Victoria)	'000 ha	176.3	0.0	0.1	0.0	0.0	0.0	176.4
North Queensland	'000 ha	0.0	25.0	0.0	1.1	0.1	1.3	27.4
South East Queensland	'000 ha	0.8	112.0	0.0	42.5	0.9	4.1	160.3
Northern Tablelands, New South Wales	'000 ha	16.3	0.2	0.0	0.0	0.5	0.3	17.3
North Coast, New South Wales	'000 ha	0.3	11.8	0.0	0.9	2.5	0.0	15.4
Central Tablelands, New South Wales	'000 ha	81.2	0.0	0.0	0.0	0.1	0.1	81.3
Central Victoria	'000 ha	30.8	0.0	0.0	0.0	0.1	0.2	31.2
Southern Tablelands, New South Wales	'000 ha	21.6	0.0	0.0	0.0	0.0	0.0	21.6
Murray Valley (New South Wales/Victoria)	'000 ha	185.6	0.0	0.0	0.0	1.4	1.5	188.5
Central Gippsland (Victoria)	'000 ha	62.0	0.0	0.2	0.0	0.0	0.0	62.3
East Gippsland–Bombala a (Victoria/New South Wales)	'000 ha	46.2	0.0	0.0	0.0	0.0	0.0	46.2
Tasmania	'000 ha	74.9	0.0	0.0	0.0	0.0	0.2	75.1
Total	'000 ha	771.7	151.4	42.3	44.5	6.1	7.8	1 023.8
Proportion of softwood species	%	75.4	14.8	4.1	4.3	0.6	0.8	100.0

a Provisional data. Unknown plantations are not included.

Note: All columns and rows have been rounded, so totals may not tally. 2000–01 and 2004–05 are calendar years and 2011–12 and 2012–13 are financial years.

Source: ABARES

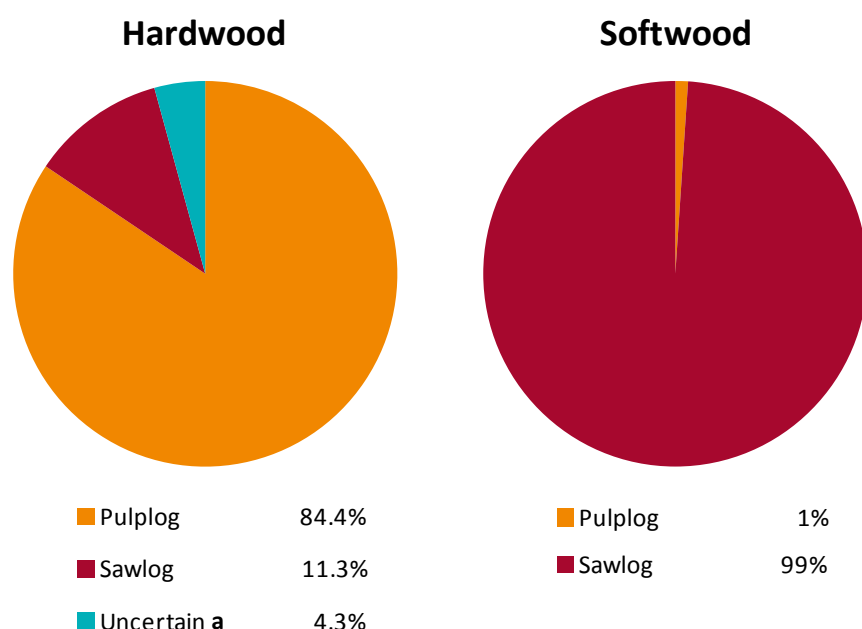
2 Logs harvested from plantation forests

Plantations managed for sawlogs and pulplogs

In 2012–13, 99 per cent of softwood plantations were primarily managed to produce sawlogs for sawn timber for the building and construction industry (Figure 3). Pulplogs produced from thinnings and low-quality parts of the stem are used to produce engineered wood products, landscaping products and paper products.

The proportion of Australian hardwood plantations managed primarily to produce pulplogs for paper manufacturing remained unchanged at 84.4 per cent in 2012–13 (Figure 3). From the 11.3 per cent of hardwood plantations managed to produce sawlogs, around 69 000 cubic metres of logs were produced in 2012–13, mainly from the public plantation estate (ABARES 2014).

Figure 3 Proportion of plantations managed for sawlogs and pulplogs, 2012–13



a Because of insufficient information about plantation management it was not always possible to ascertain the main products.

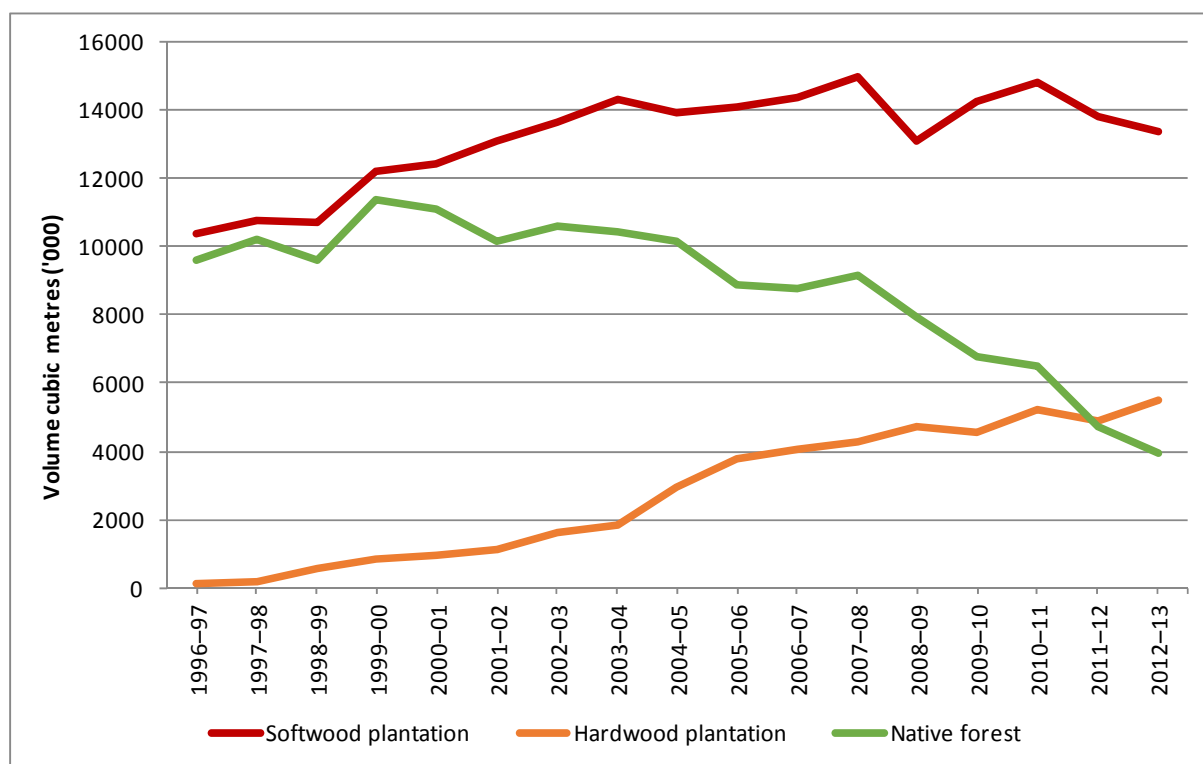
Source: ABARES

Volume and value of logs harvested

Between 2004–05 and 2012–13 logs harvested from softwood plantations decreased by 3.9 per cent, from around 13.9 million cubic metres to 13.4 million cubic metres (Figure 4). The volume of plantation hardwood logs increased from around 2.9 million cubic metres in 2004–05 to more than 5.5 million cubic metres in 2012–13. In contrast, native log harvest declined by 61.2 per cent (Figure 4). In 2012–13 plantations produced 82.7 per cent of the total wood supply from Australian forests.

In 2012–13 the gross value of logs harvested in Australia was \$1.5 billion, 6.9 per cent less than in 2011–12, comprised of plantation logs at \$1.16 billion and native forest logs at \$354 million (ABARES 2014). Most of the decrease in value was from native forests.

Figure 4 Log harvest by forest type, 1996–97 to 2012–13



Source: ABARES

Glossary

blackbutt	<i>Eucalyptus pilularis</i>
blue gum	<i>Eucalyptus globulus</i>
Dunn's white gum	<i>Eucalyptus dunnii</i>
flooded gum	<i>Eucalyptus grandis</i>
hoop pine	<i>Araucaria cunninghamii</i>
maritime pine	<i>Pinus pinaster</i>
radiata pine	<i>Pinus radiata</i>
shining gum	<i>Eucalyptus nitens</i>
southern pines	<i>Pinus caribaea, Pinus elliottii</i>
spotted gum	<i>Corymbia maculata</i>

References

ABARES 2014, *Australian forest and wood products statistics, September and December quarters 2013*, Australian Bureau of Agricultural and Resource Economics and Sciences, Canberra, May.

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