Specialty Wood Products
Research Partnership

MARLBOROUGH RESEARCH CENTRE
Te Rito Hiranga o Wairau

Developing the potential of New Zealand's portable sawmilling and alternative timber sector
Report: Survey of small-scale sawmillers

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Leadership in forest and environmental management, innovation and research

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FOREST GROWERS RESEARCH

ACKNOWLEDGEMENTS

The focus for this FGR survey was to gather information about the small-scale sawmilling sector that is largely lacking – who is operating portable and mobile sawmills, the size and geographic scope of sawmilling operations, the main timbers being milled and how they are sourced, what happens to the milled products, how operators publicise their services and products, the problems they encounter and potential solutions they envisage.

The 75 survey participants provided a large quantity of rich and valuable information, and we thank all those who took time to complete the survey, including adding many thoughtful comments.

Work on this project to date has been guided by a voluntary working group, all of whom have an interest in the alternative timbers/small-scale sawmilling sector. Valuable input was made by group members:

- Peter Berg (NZFFA Executive and Tanes Tree Trust)
- Angus Gordon (NZFFA Executive and SWP Project Steering Group)
- Vaughan Kearns (Ruapehu Sawmill)
- James Powrie (Forestry project manager)
- Richard Thompson (MacBlack Timber Ltd)
- Gabrielle Walton (Summerhill Timbers)
- Justin Wells (Logs2Lumber)

We also received professional advice and feedback on the survey design from Negin Ahmadi Saber Doust at Auckland University of Technology.

Work to date on this project has been funded by the Speciality Wood Products Research Partnership/Forest Growers Research. Thanks are due to Marco Lausberg (SWP Project Manager) for his input into the work and Russell Dale (Research and Development Manager, FGR) for his support.

PART 1: INTRODUCTION

Small-scale sawmillers play an integral part in New Zealand's forestry and wood processing value chain by supplying domestic markets with alternative timbers for specialty wood products. These sawmillers include both mobile sawmill operators who travel to where the trees are growing, and '*in situ*' small-scale sawmilling businesses operating at permanent sites.

An earlier report reviewing the small-scale sawmilling sector in the Hawke's Bay Region[1] as part of a regional development initiative identified a possible opportunity for some type of industry group for small-scale sawmillers. At present the small-scale sawmilling sector is highly disparate, with operators working independently and with no independent industry body to give them a common voice or wider representation. The establishment of Farm Forestry Timbers under the auspices of NZFFA sought to address this. This has had some support but increasing the productivity and professionalism of the sector is seen as one important part of the work needed to develop the potential of the alternative species value chain in New Zealand.

The objective of the project 'SWP-WP132' was to reach the 'Stop/Go point' of determining whether there is support and motivation by those working in the existing portable sawmilling sector to begin the process of establishing an alternative species sawmilling and wood processing industry group.

This report provides the results from a survey of New Zealand's small-scale sawmillers with the 75 survey responses received demonstrating significant interest and support. Given this feedback, a workshop is proposed for all involved to be held in the next few months with the aim of enabling a 'Stop/Go point' to be reached –, where 'Go' would signal that there is sufficient support and motivation from those working in the small-scale sawmilling sector to begin the process of establishing an industry association.

How the discussion document and survey were distributed

The project team (Paul Millen, Harriet Palmer and Marco Lausberg), were assisted by a project Working Group comprising people with experience and strong connections to the small-scale sawmilling sector. A discussion document "A proposal to develop New Zealand's alternative timbers industry" was prepared which described the current state of the small-scale sawmilling sector and made the case for an industry group of some sort.

An on-line survey was then designed and piloted by Working Group members. It was launched at the beginning of August 2020. It was made available on-line via a direct web-link, so easily accessible to anyone with an internet connection. It was not available in hard-copy format.

The survey was publicised in several ways:

i. Direct e-mailing (along with the discussion document) to FGR's list of sawmilling contacts
ii. Via the Mahoe and Peterson websites and newsletters
iii. Via a media release with links to the survey and discussion document – this resulted in, amongst others, distribution via Friday Offcuts and Tane's Tree Trust newsletter; also an interview with Peter Berg on Radio NZ's Rural News
iv. Through the MPI/Te Uru Rākau Indigenous Forestry Section newsletter, which was distributed to all sawmillers with a licence to mill indigenous timber (over 140 sawmillers)
v. Via an independent Facebook group used by small-scale sawmillers - 'Timber Slabs and Sales'.

Links to the survey and discussion document were also available on the Forest Growers Research website.

Originally the survey was due to close on August 15th; however the date was extended, and the survey was finally closed on August 31st.

[1] Portable sawmilling of locally grown alternative timber species: A report on the potential for a sustainable small-scale industry in Hawke's Bay Region – Paul Millen (May 2020) SWP Technical Report T100

A total of 75 completed surveys were received. Respondents generally completed all relevant questions, and almost all added comments wherever they were offered that option. The impression given was that many of those who participated in the survey had been waiting for a long time to be asked about their business, their working environment, and their ideas for improving things. This impression was reinforced by several phone calls received from people who wanted to discuss the survey's objectives further or who had questions about what was going to happen following the survey.

The survey participants

Responses came from a wide range of small-scale sawmillers, and people who use small-scale sawmillers, throughout New Zealand. Participants were predominantly male, with 53% under the age of 65. Around 60% of all respondents consider their sawmilling-related business to be commercial.

At the large-scale end of sawmill operations, seven respondents operate full-time businesses three or more employees, and further nine operate full-time with one to two people working in the business. The largest group of respondents classify themselves as 'commercial part-time' operators. At the other end of the spectrum, about 22% of respondents occasionally do commercial work.

This information, combined with data collected on business income, confirms that the sector features a few large and many small operators. One factor mentioned several times was that a number of the smaller-scale respondents are hoping to grow their business.

SUMMARY: IS THERE SUPPORT FOR AN INDUSTRY GROUP?

Full details of survey responses are provided in Section 2 and Appendices 1-5.

A primary objective of the survey was to move towards a Stop/Go point: "Is there enough support and motivation within the small-scale sawmilling sector to begin the process of establishing an alternative species sawmilling and wood processing industry association?.

Participants in the survey were asked directly whether they would consider joining an industry association, and what benefits such an association might bring to their businesses (Questions 20 and 21). All 75 participants answered these two questions. In response to the question "Would you be interested in joining an industry association for small-scale sawmillers?", some 86% answered 'Yes'.

Many additional comments were received related to this question (See Appendix 5). Some of these qualified their 'Yes' their answer with an 'it depends on …', but the majority supported the idea.

The top five potential benefits identified are:

- developing and promoting alternative species grading and standards
- developing a NZ wide-network of professional smaller-scale sawmill operators, supported by a web site, promotion, and marketing events
- research and product development
- developing branding and collaborative marketing
- providing help with Health and Safety and employment responsibilities.

The positive response to these two questions together with other information gathered in the survey, leads to the conclusion that there is a strong case for pursuing the idea of an industry association.
Other responses which reinforce the case for an industry group include the levels of satisfaction indicated with only a small proportion of respondents actively dissatisfied with the industry; the majority are either neutral or satisfied/very

satisfied. So we can conclude that most people want to continue sawmilling (although several did mention 'getting older' as a problem in a later question).

However, participants took full advantage of the opportunity to identify the 'top three' problems they encounter, along with some perceived solutions to some of the industry's weaknesses (see Appendix 3,4 for full lists).

An initial analysis of all the problems listed led to some recurring topics being identified and so five broad categories were created, and responses allocated into these categories (ranked in order below from most to least responses):

- People-related
- Technical
- Markets and marketing
- Log supply
- Financial

The 'top three' solutions provided were allocated into five slightly different categories (again ranked in order from most to least responses):

- Collaboration
- Promotion/marketing
- Compliance/grading/standards
- Education/training/certification
- Technical

Responses include some very positive suggestions for the sector: all the problems, solutions, and associated comments provided deserve further in-depth consideration and analysis should this project continue.

In answer to the question 'What kind of support would you like to receive from other stakeholders to help grow your business and to help the industry as a whole?' the top six focus areas identified were as follows:

- 'Wood first' policies from national/regional authorities
- Industry collaboration and coordination
- Increased domestic manufacturing
- Training
- Branding and marketing campaigns
- Long-term contracts suited to small-scale sawmillers

In theory, all these areas could be addressed by a well-resourced industry group, so the responses to this question demonstrate significant support for continuing with this project.

One survey participant commented:

"This industry is waiting for an opportunity to become larger scale. New Zealand needs more sustainable housing, built using untreated wood, and farming using untreated timber. A strong coordinated group can do this and will create employment plus keep NZ heading towards healthy choices for ourselves and the environment."

Involving timber merchants in the initiative

As an additional element to the project, it was decided to adapt the survey questionnaire and ask timber merchants to complete the survey. A total of 18 timber merchants were identified, including specialty timber merchants and 'big barn' retailers such as ITM and Bunnings. An attempt was made to contact each merchant by phone and identify the best person to email the survey to. However, this initiative proved largely unsuccessful, with only one person, Mark McKenzie of Christchurch company 'Timbers of New Zealand' completing the survey.

As one of New Zealand's few specialist retailers of home-grown timbers, Mark's responses are valuable and we thank him for his time and the thoughtful comments made. See Appendix 7 for a full transcript of Mark's responses (published with his permission).

NEXT STEPS

The next crucial step will be to give members of the alternative timbers sector the opportunity to set goals for a collaborative strategy and action plan and to then seek wider support and funding to implement this.

To this end, the main recommendation of this report is for a workshop to be convened, and some or all survey participants to be invited. Representatives of government and forest industry will also be invited. The aim of the workshop would be to (i) identify a framework and timetable for the next stage of work, (ii) select members to form a project steering group from within the sector who would be prepared to lead the next stage of the project, and (iii) identify what level of industry financial support could be raised to leverage government funding for the next stage.

This survey and report were funded by the MBIE/Forest Growers Research Specialty Wood Products Research Partnership (SWP). While funding for the workshop is likely to be available from SWP, any further action will need alternative funding as this becomes an industry development project rather than research. Of the 75 responses, 56 were from NZ Farm Forestry Association members. Hence, further industry support may be considered by FGLT's Small and Medium Enterprises committee.

In addition, there are a wide range of sawmills used by respondents including those that are NZ manufactured sawmills (Peterson, Mahoe and Turbo). Sawmillers also invariably are users of chainsaws. Long-term sponsorship could be sought from these companies.

There are two other major groups to engage and seek support from: timber merchants and architects.
Timber merchants have a central position as traders of both imported timbers and locally grown alternative species (and despite receiving only one response from Mark McKenzie of Timbers of NZ to our initial survey). This makes them the largest stakeholders in the value chain (as shown in Fig 1).

On the other hand architects significantly influence the current trade through their role in specifying timbers for their clients. There was no attempt to consult them as a part of this initial project so this can be undertaken as part of a future action plan.

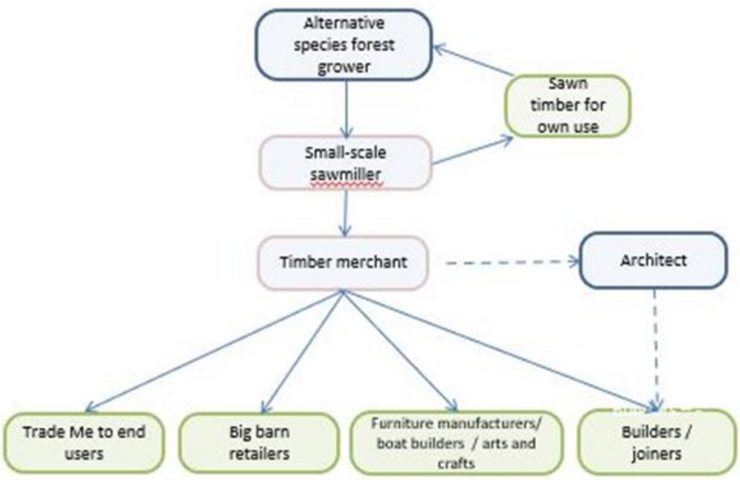


Fig 1: The alternative species value chain. Sometimes sawmillers and timber merchants are one and the same business.

Provided there is some industry funding and sponsorship, one promising possibility for leveraging government funding is MPI's Sustainable Food and Fibre Futures fund. Work to establish an alternative timbers/small-scale sawmillers industry association appears to fit the objectives of the fund:

"SFF Futures aims to deliver long-term environmental, social, economic, and cultural outcomes for New Zealand. We want to know about the public good benefits of your project. In particular, we want to know how it will contribute to:

- *the economic prosperity of New Zealand's primary industries (for example, by developing high-value products, increasing productivity, or boosting skills)*
- *improved environmental performance for the benefit of current and future generations (such as through improving water quality or reducing methane emissions)*
- *the development of thriving and sustainable rural communities and whānau/hapori (for example, by creating regional development opportunities, improving mental health, or lifting worker safety)."*

The fund offers a number of alternative packages, including grants and partnerships, and has a range of funding amounts, models and durations. One option which might suit a proposed project to establish an industry association to plan and deliver outputs towards the top six focus areas would be a three-year project with a grant of up to 80% of total costs and up to $2million available. However, the SFFF contribution to this type of project is likely to typically fall into the 50-60 percent range. The first likely job for the proposed new steering group could be to produce a possible action plan and budget to use to seek project funding from potential members; NZFFA and the FGLT; sawmill manufacturers and timber merchants; and other agencies (for example AGMARDT and regional councils with funds available for economic development) sufficient to then prepare an application to SFFF.

A LONGER-TERM VISION for the SMALL-SCALE SAWMILLING INDUSTRY

According to the National Exotic Forest Description 2019, New Zealand currently has an estimated 67,000 ha of alternative species. This figure is widely acknowledged to be an under-estimate because of the way the data are collected. In a recent pilot project[2] to develop a new alternative species inventory methodology, the measured area of alternative species in Hawke's Bay was some 40% greater than the NEFD figure; this underestimate is quite likely to apply nationwide.

Much of NZ's alternative species resource is semi-mature, so in coming decades represents a significant opportunity for the small-scale sawmilling industry. Currently New Zealand timber merchants import some 72,000 cubic metres of timber a year, valued at $112.5million (MPI 2017). This timber is generally destined for high-value end-uses such as indoor joinery, outdoor decking etc. Increasing the capability of existing alternative timbers value chains in the regions will result in increasing the availability of, locally grown timbers that can replace a greater proportion of these imports. In addition, sawn products could be exported into high-value markets in Asia, Australia, North America and elsewhere.

The report prepared for the Hawke's Bay Regional Council[3] estimated that, based on 50% of the existing area of 2,745ha of alternative species in Hawke's Bay (NEFD 2019) being available to harvest over the next 20 years, and given its current age class, 7-8 full-time sawmilling businesses operating from a permanent base could be sustained (some milling softwoods, some milling hardwoods, and given a market for their products). The number of businesses would increase if some of the sawmillers were mobile. Using similar assumptions (and excluding the approximately 9,000ha of eucalypts grown for pulp in Southland), *indicatively* the existing 67,000ha national alternative species resource has the potential over the next 20 years to increase the capability of the sector to around 240 full-time softwood sawmilling businesses, and 140 full-time hardwood sawmilling businesses, and again more if some are mobile operators.

A further positive factor is the current resurgence in interest in growing alternative species, as landowners and policy makers begin to question the risks involved with a pine monoculture producing a commodity crop, around half of

[2] National forest owner survey and resource inventory of alternative species: Stage One of Hawke's Bay Region pilot project (Vega Xu and Harriet Palmer 2020) SWP Technical Report T110.
[3] Portable sawmilling of locally grown alternative timber species: A report on the potential for a sustainable small-scale regional industry in Hawke's Bay Region (Paul Millen, 2020). SWP Technical Report T100.

which is exported as logs. There is evidence that redwoods and durable eucalypts are increasingly being planted, both as a replacement for radiata pine on cut-over sites, and on pastoral land where a land-use change has been decided upon. There is also a move towards planting and milling more native species, especially tōtara, under approved management plans.

The Hawke's Bay report estimated that New Zealand's small-scale sawmillers may currently be milling as much as 80,000 cubic metres of timber per year, with a value of around $80 million. If this timber wasn't being produced, the volume and value of imports would be even greater. So while small scale sawmillers are only a modest part of NZ's forestry and wood processing sector, their current success demonstrates the opportunity for making a significant contribution. This sector has huge potential if their capability can be increased.

These factors, combined with the energy, skills and passion of the people involved being able to collaborate via a new industry association, points to a promising long-term future for a well-trained, professional small-scale sawmilling sector in New Zealand – one which is co-ordinated by an active and relevant industry association which has a clear remit from its members.

The immediate needs of the sector have been identified by the survey; the potential long-term benefits of an industry association have also been identified and are repeated below:

- developing and promoting alternative species grading and standards
- developing a NZ wide-network of professional smaller-scale sawmill operators, supported by a web site, promotion, and marketing events
- research and product development
- developing branding and collaborative marketing
- providing help with Health and Safety and employment responsibilities
- developing training/education opportunities.

Our vision is that, under the leadership of a strong industry association, the capability of the small-scale sawmilling industry develops to become a greater contributor to sustainable regional economic development goals. Existing members of the sector will be able to train, up-skill and become certified as professionals and be rewarded accordingly, and the industry will be attractive to new entrants who can see an interesting and rewarding career pathway.

Value chains will be developed and strengthened by marketing and branding so that locally grown alternative species timbers will become the first choice for all relevant applications.

Landowners will also be encouraged to consider planting alternative species if sustainable regional value chains exist. When the time comes to harvest, they will be confident that their trees can be sold at prices that reward them for the effort put into producing a quality product.

PART 2: SUMMARY OF SURVEY RESPONSES

In total, 75 valid responses were received.

Q 1: Please tell us who you are

Of the 75 respondents, all but three provided their first name and surname. Some 50 respondents also provided a business name.

Q 2: Is sawmilling an important part of your business?

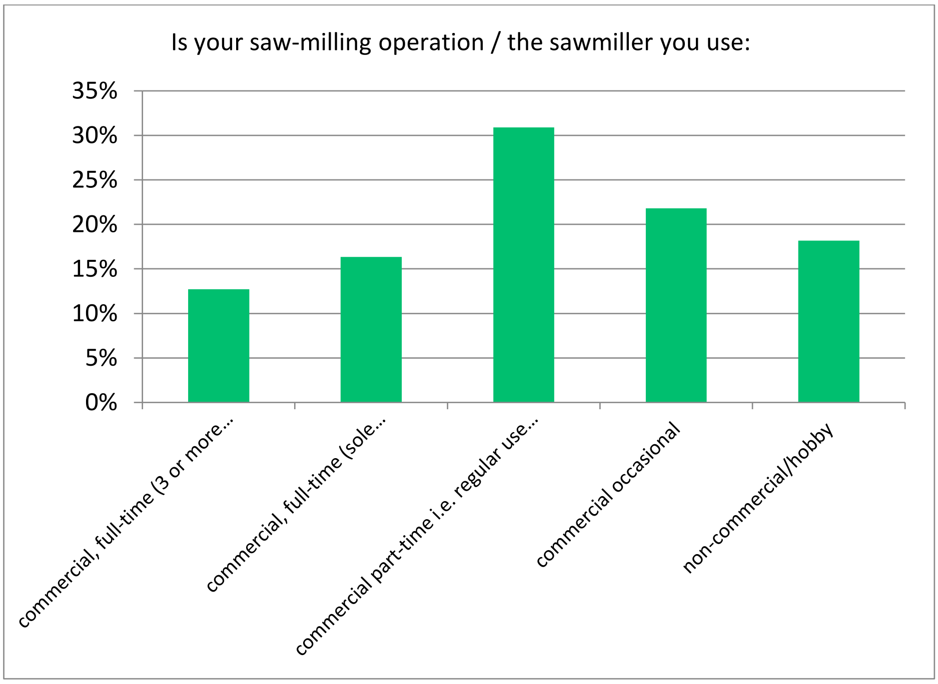
Yes – 53%
No – 47%

Respondents who answered 'No' then described their involvement with the small-scale sawmilling industry. There was a broad range of responses from these non-commercial sawmillers, but one theme is that many respondents have plans to become more commercial, or at least in future sell some of the timber they mill (Appendix 1).

Q 3: Scale of operations

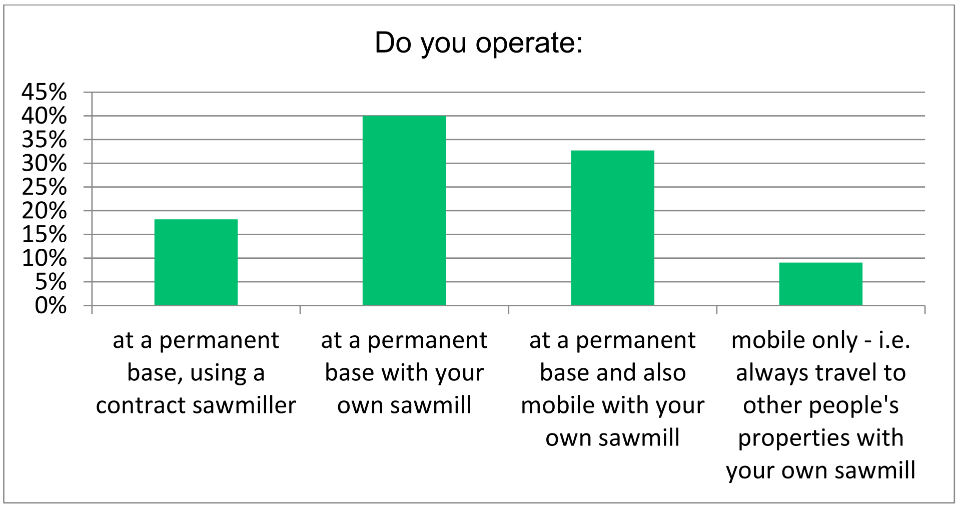
The largest group of respondents (31%) classed themselves as 'commercial part-time' – i.e. with a sawmill/s in regular use throughout the year.

The total number of full-time operators was 16 (7 with three or more employees, 9 sole operators).
82% of respondents to this question considered themselves to be commercial operators of some sort.



Q 4: Operating from a permanent base or offering mobile services

40% of respondents operate from a permanent base with their own sawmill; a further 32% have a permanent base but also operate a mobile service.



Q 5: If you operate from a permanent base, where do you get your logs from?

This question was included to see how many operators at a permanent base were simply using home-grown timber, and how many were sourcing logs externally.

Of the 52 valid responses, 19 people were predominantly milling logs they had grown themselves. Several mainly milled home-grown logs but also occasionally other locally sourced logs. At the other extreme, some operators obtain logs region-wide.

Q 6: If you operate a mobile service, what region do you cover?

There were 27 valid responses to this question, and all but one respondent appears to travel at least region-wide to provide saw-milling services.

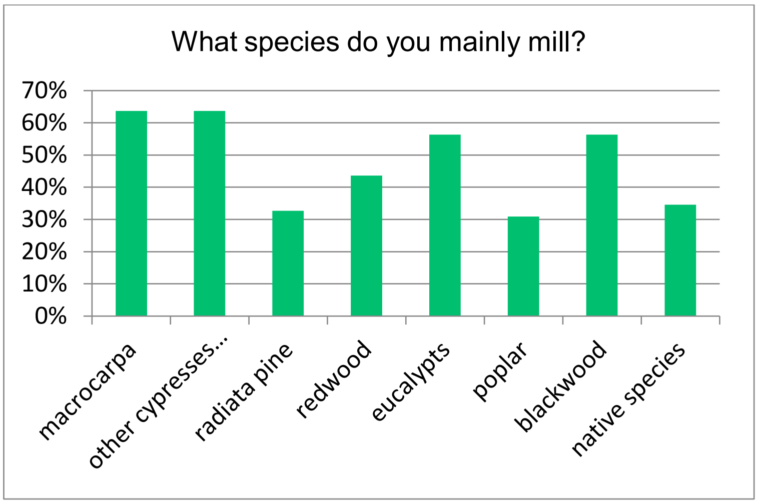
Q 7: What type of sawmill do you operate?

The tally of different sawmills is as follows:

Alaskan	5
Lucas	11
Lumbermate	2
Mahoe	11
Norwood	1
Peterson	6
Rimu	1
Turbo	1
Woodlands	3
WoodMizer	15
Other	9
Total	**65**

Q 8: What species do you mainly mill?

Respondents were able to tick as many species as applicable. Macrocarpa and ‘other cypresses’ were most often milled (milled by 64% of respondents in both cases), followed by eucalypts and blackwood (56% of respondents).



Amongst the 'other species' recorded were oak (which was most commonly noted), elm, Douglas-fir, Chinese fir, swamp kauri, ash, cherry, London Plane, walnut, and red beech.

Q 9: Estimates of timber volumes milled (operators with a permanent base)

This question (and Q10) was not specific enough to ensure respondents identified volumes of both hardwood and softwood milled. In most responses, quantities were amalgamated.

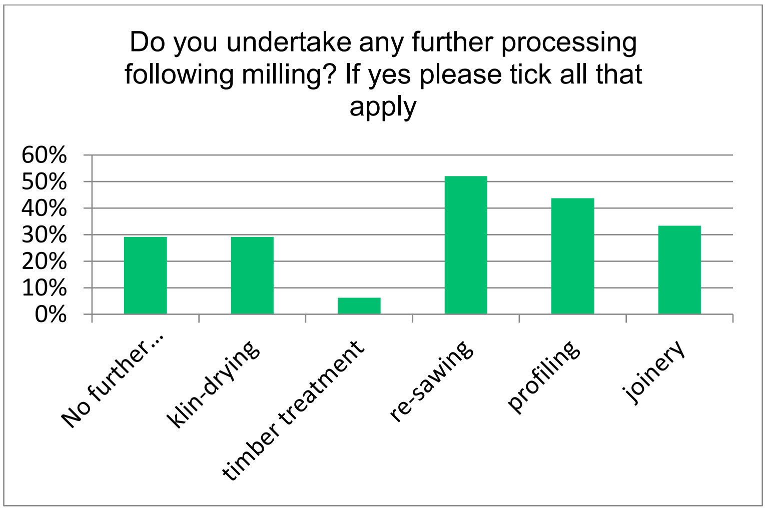
- 5 operators mill over 1000 tonnes/yr
- 29 operators mill 100-1000 tonnes/yr
- 24 operators mill under 100 tonnes/yr.

Q 10: Estimates of timber volumes milled (mobile operators)

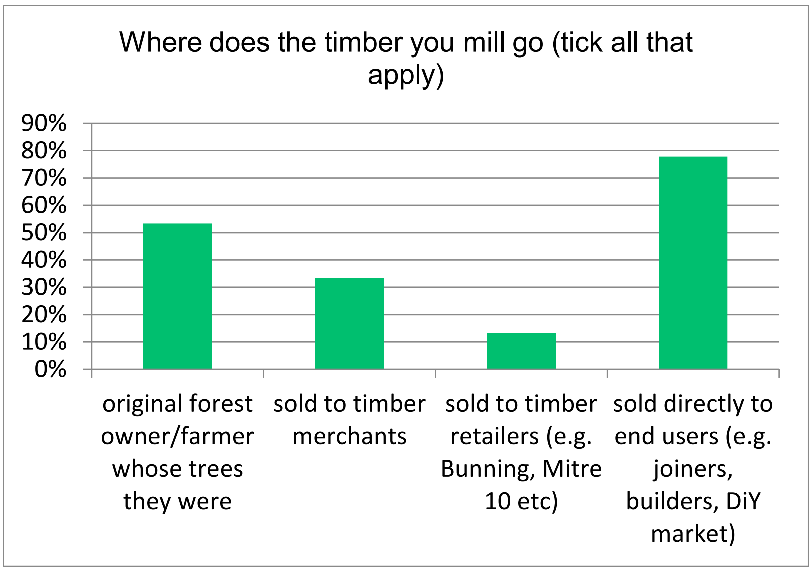
- 11 mobile operators mill over 100 tonnes/yr
- 7 mobile operators mill 1-100 tonnes/yr.

Q 11: Do you undertake any further processing following milling?

Around 71% of respondents undertake some sort of further processing following milling. Re-sawing is the most likely secondary activity, followed by profiling.



Q 12: Where does the timber you mill go?
Respondents were able to tick all boxes that are applicable, and the 'Other' box. 78% of respondents sell milled timber directly to end users; 33% sell it to timber merchants, and 13% sell it to timber retailers.



'Other' destinations for timber recorded by respondents included a majority who use it themselves – see below:

Other destinations for timber - own use	'Other destinations apart from own use
Keeping for own use	Maraes
Our own use on our property/house	Garden supplies
For my own use but looking to export some amount	Yet to identify. Could export squares to China where Cunninghamia is the #1 softwood plantation species.
Own use	Firewood
Into our building business	Primarily direct to benchtop makers (clears) and joiner/platter maker for restaurants.
We use ourselves for our own manufacturing joinery business	We export 50 to 80%
Some to neighbouring farmers but mostly for own use	Often sourced and milled house lots for owner builders.
At present mainly for my own use.	
For own use	
I quite often give timber or logs to those people who need them. What goes around comes around.	
Own use and give away	
Use it, and try and sell it	
Members of the public	
Own use	

Q13: How do you publicise your services or the timber that you are marketing? (tick all that apply)

No publicity – only 'word of mouth'	64%
Your own website/Facebook page	40%
Other websites or on-line directories - e.g. TradeMe, Farm Forestry Timbers, Builders Crack etc	25%
By attending events/field days	9%
Direct marketing (e.g. flyer drops, cold calling)	8%
Yellow Pages	2%

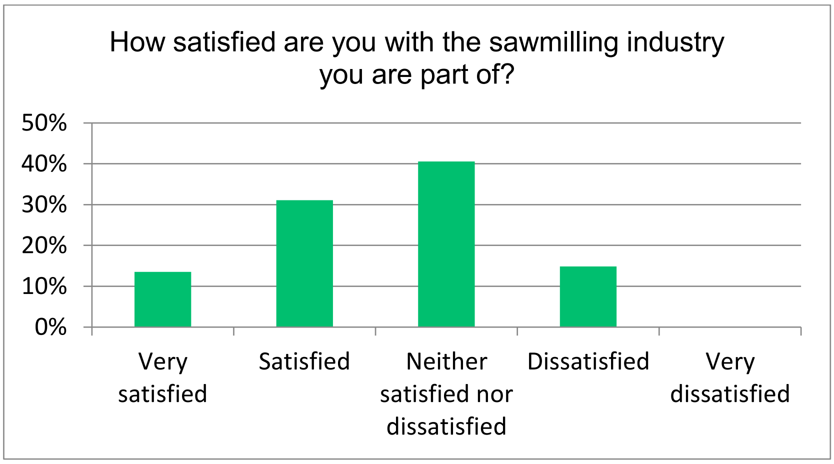
Amongst the 'other responses', several sawmillers indicate that they advertise in local newspapers.

Q14: Have you had any sawmilling training other than 'on the job'?

The response to this question was a largely negative – of the 55 respondents, only eight (14.5%) had had any training. Of these, two had been trained as NZFS Forest Rangers, one had done some 'timber classification units at polytech', and the remaining five had received only minimal or informal training.

Q 15: How satisfied are you with the sawmilling industry you are part of?

The majority of respondents (41%) are neither satisfied nor dissatisfied. Only 15% were dissatisfied, and none were very dissatisfied.



Q 16 and Q 17: Problems and solutions
Questions 16 and 17 asked respondents to identify the Top 3 problems they encounter in their work as sawmillers, and then to suggest some solutions.

The responses to these questions have been categorised and are included in full in Appendix 2.

Q 18: What kind of support would you like to receive from other stakeholders to help grow your business and to help the industry as a whole?

'Wood first' policies from national/regional authorities	74%
Industry collaboration and coordination	69%
Increased domestic manufacturing	51%
Training	46%
Branding and marketing campaigns	44%
Long-term contracts suited to small-scale sawmillers	39%
Financial support from government	27%
Rewards for creating employment	26%

The 'other' comments respondents added to the above choices cover a wide range of issues (Appendix 4).

Q 19: Are you a member of any relevant industry association?

Of the 75 responses, 56 (73%) are members of the NZ Farm Forestry Association. Other organisations reported include the NZ Institute of Forestry (4 people), the Arboricultural Association (2 people), with each of the following being mentioned once: the Tree Crops Association, Farm Forestry Timbers, the Forest Owners Association, the Marlborough Forest Industry Association, the Northland Totara Industry Pilot, the Earth Building Association of NZ, and Henley Mens Shed.

Q20: Would you be interested in joining an industry association for small-scale sawmillers?
The large majority of respondents (86%) answered 'Yes' to this question. A large number of additional comments were received and are included in full in Appendix 5.

Q21: What services do you think an association could most usefully offer small-scale sawmillers and others in the alternative timber industry? (Tick all that apply)

developing and promoting alternative species grading and standards	89%
developing a NZ wide-network of professional smaller-scale sawmill operators, supported by a web site, promotion, and marketing events	78%
research and product development	70%
developing branding and collaborative marketing	63%
providing support around Health and Safety and employment responsibilities	45%
introducing 'chain of custody' certification and 'approved operator' schemes	41%
introducing practitioner events, training, and annual awards across the value chain	36%
attracting new entrants through developing career opportunities based on formal education and training pathways	29%

Some of the 'other' suggestions were as follows:

- Make people aware of other advantages and disadvantages of alternative species, e.g. soil conservation, nectar, amenity as pluses, higher fire risk of eucs and cypresses as negatives.
- getting some mass for various species – e.g. I have some very nice cedrus deodar, but not enough to be commercially worthwhile. Could be useful to have some resource inventory.
- maybe some sort of 'sustainability' scheme for added value marketing
- Chain of custody may be applicable for some markets, but not required for all. Must be cost effective (premium or access dependent).
- Investigation of export opportunities.
- don't leave out radiata pine!
- There are always issues ...obviously anything that makes things run smoother…
- Especially development and promotion of alternative species, grading and standards.

Q 22: Do you have any other comments?
The following list provides an indication of the generally enthusiastic and thoughtful contributions many respondents made to this survey.

- It would be good to source quality alternate species for my architectural design business. Access to grading would be very useful.
- Don't ensnare small millers in a system where they get tied up in licensing and bureaucracy - it'll force people to go underground.
- Make sure there is not too much legislation and licensing as this would scare off many small millers. Keep it simple, keep everyone connected, without too much bureaucracy and power hierarchy.
- These have been tried before. I initiated a South Island wide sawmillers Co-operative in the late 1980's that was briefly successful in expanding markets in Australia. The main and continuing issue will be the independent nature of the small mill owners who jealously guard their niche and are unlikely to play

well in an industry body.

- The fact that Chinese Fir has thus far been largely overlooked as a secondary species for NZ is instructive. It is a reminder that there may be other candidates out there. As a professional forester I am inherently wary on claims made for secondary species - radiata pine is very hard to beat on commercial grounds, and deserves immense respect.
- A concept whose time has come.
- I am impressed by the AHEC [American Harwood Export Council] and would like to see something similar in NZ but wonder if we could get sufficient support to fund it. I think our focus should be mainly on exports and not necessarily on import substitution or promoting alternative species use within NZ. The latter appear to be a good idea but my own experience suggests that it is costly and may not succeed.
- Sounds like an awesome idea, I don't know it all and would love to know / learn more. I don't associate with any other sawmillers so it's just one big learning curve on my own as I progress
- General arguments for wood as a versatile, low energy carbon sequestering resource with alt spps filling gaps left by radiata pine.
- Great idea, let's do it!
- Facebook marketplace has been amazing, concerned it may not continue
- Small scale sawmilling must be one of the most attractive business ideas around but the landscape looks to be littered with failed milling ventures. A great way to go Bust unless we can work better together
- Be good to have a hub where producers and buyers can post their alternative species requirements and products
- Good to see it raised here.
- As a grower of special purpose timber species, I have been frustrated by the inability to market the logs/timber on any scale. NZ forestry has been predominantly focused on P.radiata to the detriment of other species.
- Only useful if very focused and market oriented.
- We welcome any interested parties to get in contact if there are specific species that may form part of other research for trial plots at the Arboretum
- Portable sawmilling of radiata pine. Any thought given yet to exporting part sawn timber. 350mm x 350mm in rough sawn for exporting. This could employ a lot of people to produce a low grade product for further processing off shore or do we just cut large clears?? Don't get fixed on specialist timber species only. A co-operative setup to export radiata could be a goer?
- What is your Main objective...We have been going alone for almost 30 years and seen many changes. Good ..and Bad...we have seen operators come and go ...and that won't change ...someone has to Run it ...this is not a 5 minute job ...MPI need to be on board as they are the ones who quite often call the Shots ...they have to be seen as being on the OPERATORS SIDE ...NOT opposing....on the other hand operators need to Run a honest legal Operation...any SUCCESSFUL Venture /team has a Good leader/Coordinator..
- Thought most of these things are promoted and addressed by the NZFFA. Looks to me like a lot of this is on a parallel footing. Maybe best to join forces.
- This is a good strategy. Congratulations.
- I have read the discussion paper. It is well written and I broadly agree with what it has to say.
- While I see real possibilities in the promotion and use of alternative timbers my observation of the pine sawmillers is in the end "it's every man for himself" I have spent 25years building a reputation with merchants and homeowners throughout NZ and while protective of my "brand" I have a good relationship with other similar businesses that I value
- Seems to me that with some funding the Farm Forestry Timbers could be that organisation that is now being sought to be established?
- Good if it is part of NZFFA, rather than a separate association.
- Pine is fine...
  Most specialty species do not need to be treated. This is the direction we need to head. With good training, quality wood can be cut here in NZ for our use or export.

Some demographics
93% of respondents are male; 68% are over 55 years old; and only a small percentage (around 18%) do not have tertiary education. In terms of how much respondents earn from sawmilling, over 20% of respondents prefer not to say what their gross income is from sawmilling. 43% are in the ‘Under $25,000 p.a. bracket, 13% in the $25,000-$50,000, and at the other end of the spectrum, 7% are earning over $200,000 p.a.

Finally, 95% of respondents would be happy to be contacted again by the survey organisers.

APPENDICES: Full responses from some key survey questions

Appendix 1: Please tell us about your involvement in small-scale sawmilling (Q2)

(This question was targeted at non-commercial operators; however, almost all respondents answered it.)

- I grow trees and will have to start thinking about how to realise the value of the investment very soon. One of those options is to process myself.
- We have a portable mill that we use to help teach Wood manufacturing to students and stakeholders
- Sawmilling is an important part of my wellbeing, and therefore my business.
  My sawmilling as yet, has had no financial impact other than providing sawn timber for my own purposes.
- Looking for alternatives for my own projects and for projects that I consult on.
- I buy wood as much as possible from small-scale local millers, to build furniture from.
- i have regularly used a local portable saw miller to mill native and special purpose timbers for our own use.
- small scale amongst other contracting activities
- Hobby scale small sawmill and small plantings of native timbers.
- I have a small holding (10 acres) of various species planted from 1984 onward. Many are reaching millable size so I am setting up a small band mill to convert the logs to boards and timber. I may sell some, and possibly mill logs for neighbours on a hobby level.
- I have an Alaskan mill that I got for milling timber for the house I'm making. I also have several logs that I've applied for permission to mill, although it's a lot harder than I thought it would be. If there was an association like you are proposing, I'd sell my mill and just find a good local person (I've tried to get one local person to do it, but they have been horribly unreliable, and I'm probably not going to get my deposit back).
- We have 7 ha of mixed blackwood and a mix of euc. These are approaching 30 years and we anticipate milling as much as possible with a portable mill and welcome a plan for this and selling alternative timber industry to be developed.
  We have had a portable sawmill in to cut our trees over the past few years and have been very impressed with the result. It is great to be able to fell occasional trees as required as well as larger scale. Our slabs were sent on to a local mill who welcomes alternative species and the timber has mostly been used for house floors walls and finishing.
- Research
- Demonstration Sawmilling and sawmill sales over 30 years
- At the inception stage. I have the forest resource and the primary milling unit, but am only completing commissioning the latter.
- I have had 16 trees milled (lawson, acacia dealbata, & lusitanica) four years ago. Now stacked and dried. I used a local contract portable sawmiller, who unfortunately has little regard for Health & Safety regulations. I have more trees to mill over the coming years.
- A variety of alternative timbers have been sawn on the property and eucalypt logs, mainly E. muelleriana and especially cypresses have been sold to sawmillers and also Gunns Veneers when they were operating 15-20 years ago
- Sawing mainly for farm use- P radiata, C.macrocarpa, Euc fastigata, Euc regnans, Thuya plicata, Sequia sempervirens etc.
- Just starting to mill some dead native trees on our farm (puriri, pohutukawa, taraire and totara). Also have blackwoods, gums and macrocarpa that are ready to mill. Currently have a contract miller and own an Alaskan mill, but looking to buy our own portable mill.
- I have a Mark 8 Lucas mill and currently produce timber for my own use, mainly pine, redwood and some cypress. But I am interested in selling some timber.
- Commissioned sawmilling of various species in the past including all macrocarpa timber sizings for house construction, from weatherboard to sills, TG&V panelling, architraves, skirting and joinery cuts. Have a Alaska mill.

- Using a contract portable sawmiller to produce timber for local sale
- Use mobile mill to mill my own trees and any firewood treesI I acquire trees that are too good for firewood (mostly macrocarpa)
- I have a Lucas mill but it is not currently commercially active. I am a long time member NZFFA and have woodlots of non-pine timbers
- I own a Peterson WPF, with 8inch hardwood blade. Used on home block only, and nothing yet sold. Feel too busy to make it a business, but may sell some boards on Trademe or FFT site. Small amounts of leyland, acacia and eucs.
- I own a 50 acre forestry block in the Waikato, growing C. lusitanica, and A. melanoxylon and E. regnans. Planting started in 1992, and I'm now ready to harvest. For a variety of reasons I've decided to mill the logs on-site and am currently exploring my options for that
- Utilizing my own trees for on farm use of timber. Also hobby use for creative purposes.
- I regularly use a mobile sawmill and intend to purchase my own soon for myself and to do others logs. I am growing my own small forests(5ha). I am a member of the Cypress and Eucalypt Action Groups.
- Previous long term involvement with portable sawmills and I attempt to build projects with non radiata timber where appropriate. I currently access timber from two local mills who also mill my logs. I would like to have a small mill on site at a forest dedicated to specialist species that are rapidly maturing. I have potentially a minimum of 9000m3 of sawn specialist species timber currently growing.
- I have a Woodlands bandmill and cut macrocarpa, blackwood, redwood, cryptomeria japonica, radiata logs up to 60cm diameter.
- I use millers and am researching high values species.
- Own mill to saw Blackwood.
- I have used small scale sawmills to be able to market some of my special purpose timber tree species.
- We grow some specialty timber - eucalypt, macrocarpa, poplar which are only used by small scale millers at this stage
- Involvement with the Northland totara projects - trying to get a regional industry started based on sustainable management and harvest of naturally regenerated and planted totara forests in Northland and other regions.
- We use local sawmillers to mill blackwood (and other specialty timbers in smaller quantity).
- I am a grower of Acacia Melanoxylon & Cupressus Lucitanica trees, seeking a market for them.
- We own a small forest which has 2.5 ha of mature special purposes trees along with pine. We own a portable sawmill and intend selling surplus speciality timber. I also work in a business which manufactures solid wood T&G and parquet flooring and panelling. We occasionally buy speciality timber for one-off client projects, though we primarily work with recycled timbers.
- I have logs. NO mill. Thinking about it all.
- Milled for 20 years but now mostly retired -keep for own use. Grow alternative species for production and plan to convert my Radiata block into these on harvest.
- Sawmiller, drying and timber sales
- Recently sold mill, now only selling stocked timber. Have sold in the past to builders, house builders etc. and done contract milling.
- Recently a colleague and I imported a new Cooks portable mill from the US primarily for sawing our own special purposes timbers. Both of us have a few hectares of special purpose species that are now big enough for milling (30+ years old). At the moment it is not envisaged that we mill others wood but it would certainly be possible.

Appendix 2: The problems encountered by small-scale sawmillers (Q16)

Financial	Supply	Markets/marketing	Technical	People-related
Cost of transport	under-sized timber	Sales	Separating heart from sap coming off the saw mill.	waiting for sawmiller
Access to equipment or setting up costs	log quality	warped market value of timber	Inaccurate milling	staff
capital expenditure required to make business viable	irregular log supply	Finding a good marketplace	How to treat/dry swamp kauri after milling	Available time
Costs verses returns	Sourcing good wood	Selling	Grading	Personal sawmilling expertise
	Finding logs	Exporting our alternative species logs	Dealing with waste	Weather slowing up annual milling timeframe
Supply of affordable blades	Access to suitable logs	Imported timber too cheap	Parts for mill	
Cost of sawblades	Finding speciality logs	NZ timbers (exotic and indigenous) are unable to compete (price wise) with imported timbers and furniture (often unsustainable produced)	Getting logs to miller.	Connecting with other small users.
over inflated log prices	Difficult to get good logs	Difficult to sell visually graded timber.	Mechanical repairs as I have older Mahoe	Paper work to slow and difficult for farmers to bother
cost of owning gear such as excavators to move logs	Quality of timber.	General bias to use treated Pine, where other species would be well suited.	Storage of sawn timber	expert advice when needed
Increase processing Costs A-Z	Supply of local timber	NZ consumers dont understand the availability of sustainably produced indigenous timbers	rate of growth in NZ of non native species	lack experience
economies of scale	Access to quality hardwoods	uncertain markets for alternative species	drying conditions	inability to get advice eg. milling hardbeech etc
quite expensive	Regular supply of pruned, quality timber	Variable grading of alternative species logs	no consistent grading rules for minor NZ species	Its heavy work
Downturn due to Covid-19.	Not enough sawmillers around that I know of to get the wood I need	Marketing	Necessity for manual loading and unloading of sawn timber	Finding portable mills available.
	Unreliable supply and transport	difficult to market small volumes of minor species	Inability to move most large logs (no tractor, forklift etc)	not enough younger people coming along with skills or desire
Dreamers trying to negotiate price	Consistent supply	Marketing, marketing, marketing	logistics	People with knowledge and skills are rare
Unrealistic Customer expectations	Continuity of Work	Unable to connect woodowners with timber markets	Weather	I'm getting older and have less energy
Log owners over expectations	Not enough logs	how to sell the timber that is still straight after drying	Tension wood	Time wasters
	Poor quality from other small scale sawmills.	Marketing	Nails	current NZ labour laws
	no central data base to source or negotiate timber purchases	Marketing	dry cover for seasoning	
	Log quality	People don’t [know] Product is available	Breakages	Product damage during delivery

	adequate supply of kiln dry product (when buying product)	Log Export	Weather Dependent	Advancing age! (73)
	Purchase and delivery from large harvesters	Markets for all products arising from the process.	Poor log grade	Labour
	Competition from firewood merchants for wood lots	Situation is changing but in the past lack of markets/recognition of alternative timbers main [problems.	dealing with log tension	Age.
	Obtaining continuing supply of log species	Finding a market for the timber	Wood quality	Time (lack of)
		Finding an ongoing market	log handling	Unreliability of contractor
		Marketing finished timber	Log handling	Lack of interest by architects
		Acceptance of NZ grown special purpose timbers	Weather	Skilled staff
		marketing that timber	how to saw straight timber	Can be difficult to get well trained contract sawmillers
		Lack of timber standards	when milling for myself, loads of technical problems like blade tensioning and similar.	Keeping track of enquiries
		Lack of national branding and grades for alternative species	Knowledge of cutting. Eg. Quarter sawn.	there will not be enough sawmillers when we are ready to harvest
			Handling and storage of sawn timber	too many other tasks and destracions
			how to dry straight sawn timber so it comes out straight	Unavailability of mill and contractor
			Most mobile millers do not understand hardwoods and growth stresses adequately	Old age !
			Further processing - kiln drying	Staff
			Totara bark creating a hazard in commercial pine mill	Lack of available staff
				Availability of suitable contractors for milling on-site
				finding a sawmiller interested in milling our specialty timber
				sourcing a local kiln operator
				when paying someone else to mill for me, a dodgy operator.
				Number of mobile mill operators in thei region have dropped but emergence of one attached to MacBlack good step forward.
				Getting paid on time!
				Lack of knowledge what the options are

Appendix 3: Some solutions suggested (Q17)

Education and training, certification	Technical	Compliance/Grading/Standards	Collaboration	Promotion/marketing
Grower education on sawmiller/merchant requirements	Quality control of timber grading so purchasers get what they ordered I.e. What is sold as heart is ALL heart!	Greater government support for specialty species	Building network.	access to market through timber merchants
Sharing of knowledge	Housing NZ acceptance of alternative species	Informing councils you can use native timber for buildings	Discussing issues and market prices etc.	Specialty logs and connections for same.
Building industry education on alternative species	drying facilities	Increasing the volume of Totara you can use on permits	Better coordination & promotion of platform for timber sales	market development - local or export
Training	Steady supply of NZ grown hardwoods to replace imported species used in decking	Speeding up of permits	mill availability	Coordination & Marketing
training and workshops	Access to more native hardwoods locally	Change regulations to make it easier to use alternative timbers in building	Support for small business startups	support with marketing
Training and expert advice would be good like a training day	Growers planting more alternative species	To allow small miller's to supply builders merchants with alternative timber	A more functional chain between growers, millers, and end users.	Industry-wide promotion
training and open days amongst prospective millers	More involvement prior to logging	An improvement to 3602 specifying alternative timber solutions and their uses in building without having to get an engineers report	a recognised body of millers	Need outlets for specialist timbers
an nz forum dedicated to small sawmills	Less 2 minute wonder startup millers	the compliance regulations need to allow more unusual applications, smaller housing, look to a realistic carbon important system. There is FAR to much waste in current building projects within the mainstream.t	An oganization (as proposed) would help find millers.	Marketing to architects to promote specialist timber species
Improved communication - field days, meetings	More growing and milling of naturally resilient wood that does not need treatment	design and engineering criteria (for consenting) of specialist timber species	Easy to use directory of local growers and available timber	Timber selling platform
Staff training	Make visually graded timber acceptable, without the need to go to a higher grade.	broaden nzs3602 to recognize more alternative species	Joint venture into access to further processing	List of logs of different species available locally
Education	Need to lift log prices to encourage people to plant alternative species	Make non sustainable imports illegal	Cooperative milling - eg sharing machinery	log prices not to be overinflated for domestic market
Education	machinery cost/investment	Parity for alternative timber in NZ building code and local government building consent processes.	Association	Standard pricing
Improved knowledge of how to manage crop trees	Milling contracts from government agencies councils, they cut down plenty of trees. Timber can be used for projects and lols like there making an effort to use timber sourced within.	More flexible laws for alternative timber species.	logging equipment for small scale operations	Cooperative marketing
Training	Maintaining treatment options	MPI Transparency...ASSISTANCE TO OPERATORS	Online data base and contact information	Government policy to promote and priorities the use of NZ grown timbers (indigenous and exotic)
Education.	encouraging landowners to plant alternative species increases the value of the NZ forestry industry by diversifying. As this develops the quality of NZ wood products grows in value.	Flexibility in the building code to reduce the dominant effect of the big box chains (Mitre 10, Placemakers , Bunnings etc.)	Need representation in building industry lawmaking.	Stop exporting macrocarpa 😀
Information flow.	UTILIZATION OF STANDING DEAD RESOURCES	standardised grading and specifications	A more realistic values for wood lot owners	Marketing

Better staff training	Have mobile mills attaching some of the left over waste on the cutover	Timber classing for building code	working together for industry good	co-ordinated market/sales for alternative species
More knowledge for growing quality trees	technical solutions to totara bark issues in commercial pine mill	Exterminate the GREENIES	Need critical mass of local product in the market place to grow demand	Marketing platform
Education on what Hazard classes are and which species (grown in nz) meet the various hazard class requirements.	Use of coppicing to provide land stability.	Easier permitting	An association of some sort (maybe there is one not sure)	Collaborative marketing of alternative timbers
Clear information regarding sources and applications for species other than radiata pine.	more investment in alternative species to build confidence for farmers and corporate growers that they are a good investment	Regulate Raw log export	Collaboration	Timber marketing
awareness and education programmes to better inform NZers about indigenous and exotic timber availability and quality. NZ's sustainably produced indigenous timbers are produced to world leading forest management standards and we should be proud of our resource and timber qualities.	more alternative species planted to enable sustainable small sawmills	Ban export of any raw log other than radiata pine	More contractors	Better knowledge base for architects/specifiers
Industry certification		better log grades	More reliable suppliers and.transpoters	Need more promotion in across potential markets but especially architects, builders, etc..
Certification of portable sawmillers		Standards adopted	Greater coordination between other Sawmillers	Co-operation of marketing
increase number of qualified mills/millers		the MPI process is mostly fairly clear, but I think they could make permission to mill an individual log something that doesn't need to be renewed (although if I were more onto it, this wouldn't be an issue).	a register of reliable millers with portable mills would be great!	better marketing to the construction industry of alternative NZ grown timber species
Some form of accreditation or other quality control for contractors		my problem to overcome satisfied with systems although many owners of trees are caught out when they have a native tree that was not felled within the mph system	Attaching mobile mill to further processing and sale to public good step	Branding for alternative timbers
		Timber/ building code issues	A specialised alternative sawmill (off-site) also welcome though may not be the most financially resilient model.	Sawn timber buyers offering reasonable prices
		better grading information minor species	More information about options - most if not all is provided by the vendors of portable mills	marketing network
			Having a employed person to help run the Action Groups.	Advertising
			Co-operation of processing	National branding and grades for alternative timbers
			Co-ordination of supply	Less logs going straight to port
			collectivising resource from multiple small forest areas for commercial scale	better marketing of specialty timber
			Linking saw millers with tree growers	Finding a decent market for the finished product
			Regional contract processors for drying & dressing timber	Marketing
			Central database - where sellers can specifically list what they have available	

Appendix 4: What kind of support would you like to receive from other stakeholders to help grow your business and to help the industry as a whole? (Q 18)

- Common-sense for use of naturally durable timbers. Access/knowledge/training for low net volume and sensitive harvesting systems. Directory for millers and loggers and a system to identify cowboys from safe, competent crews. In explanation the economies of scale that apply to high volume, heavy equipment logging may not apply to some low volume species.
- National promotion of suitability & use of non radiata species.
  National support for VSG (visual stress grading) put on the same level as MSG
- Suggest make contact with Guy Salmon to progress the collaborative process with the forest industry, sawmillers and NGO's to ensure NZ grown and managed indigenous timbers especially, become better understood, accepted and promoted to the NZ consumer
- more science put in minor species so they can be used for more than just shipyards or fence pailings

- Government funded hardwood planting programme
- This industry is waiting for an opportunity to become larger scale. NZ needs more sustainable housing to be built using untreated wood, farming using untreated timber. A strong co-ordinated group can do this and will create employment plus keep NZ heading towards healthy choices for ourselves and the environment.
- It is early days yet, and I am still quietly optimistic that the product may help sell itself.
- I need more time to invest in establishing a value chain for my trees.
- Timber sold at sensible pricing. Get rid of these fly by nighters and their race to the bottom prices and crappy grading
- small business support
- Dealing with dumb ass building regulations, especially around machine stress grading. Also structural engineers who are a problem when they have no wood knowledge and are risk averse.
- Rewards for having resources that can be used without chemical treatment or high energy processing and are carbon friendly
- Alternative species Always has problem with volume. So wood first can rectify this.
  It’s really a case of creating demand that can be fulfilled.
- Less bickering among producers and processors.
- Identifying resource
- Export and local market development for blackwood. Promotion of NZ grown timber among timber merchants (they only want to use imported timber).
- Government to ASSIST EXPORTERS ..
  We have been severely Restricted in Supplying Clients because of Green V MPI High Court ruling Nov 2018 We as operators were NOT PRESENT to defend ourselves and our Clients interests and are now having to in some cases turn Clients away that we were once supplying...The GOAL POST were MOVED ...we need more PROTECTION from this sort of idiocracy...
- Increase the list of alternative species, acceptable for building.

Appendix 5: Would you be interested in joining an industry association for small-scale sawmillers? (Q20)

Some of the comments are as follows:

- Well actually I might but perhaps it would be appropriate to consider having it as a division under an existing organisation such as NZFFA.
- I would like to have easier access to a group of like minded people who are prepared to share their experience and perhaps resources (like selective logging equipment/crews).
- Portable mills are a good entry point for people interested in the industry. I wouldn't want to see that opportunity blocked by an amalgamation of self-interested sawmills(ers) and NZQA (for example) making entry difficult and more costly than it already is. Some basic safety units might be appropriate but not under the NZQA model.
- It would be good for Business
- Our timber milling & retailing is very small scale so those with a greater stake are more suited to lead the need for change. It is already time consuming & not very cost effective to do what we are already doing.
- Possibly. Seems to me that with some funding the Farm Forestry Timbers could be that organisation that is now being sought to be established?
- This type of industry aligns and supports the area that I work in
- I feel I can drive the transformation for nzers to understand, accept and gain and improved appreciation of NZ timbers
- Primarily my passion is carving but to realise my vision I need to acknowledge that I am involved in an industry and make that sustainable
- Would be good to have contacts in the industry who are committed to their work
- provided it wasn't expensive, as I am at the amateur end of things.
- Share information and resources to invigorate and stimulate a national supply of alternative NZ timbers for NZ.
- We are involved in the alternative /specialty timber industry and need help to see our final crop go to good use. I have seen too many trees/blocks of trees cut for firewood because of lack of 'how to market this excellent wood'.
- We have had excellent experience with our sawmilling contractor and see this a positive start for our trees. However we are small scale and would like to imagine all the small forests co-ordinated and going to good use around NZ and many mills employing many millers!
- At an initial stage in sawmilling. Its addictive and we do not know how far we will go with it, but it is of high interest.
- Not a commercial operator
- Collaboration on quality control and marketing initiatives
- About to plant 20 ha in exotic non-Radiata Pine species
- It might help me raise my trees to the priority necessary to establish a product flow.
- To keep up with the more relevant play / trends within timber industry
- Have a reasonable resource of eucalypts and cypresses, 30 ha plus in total.
- We grow specialist timbers such as Eucalypts, macrocarpa thuya.redwood,albeit on a small scale.
  At present logging a small shelter plantation of macrocarpa which I planted sixty years ago. Up to 1.5m diameter and pruned to 4m. Would welcome access to a market for the significant amount of high quality furniture timber which these trees will yield.
- Anything to make it better.
- We are just getting into milling naturally dead native and other planted specialty trees on our farm. Being part of an industry association could benefit small scale operations like ours with help with marketing and education etc. We are part of industry good bodies to do with farming and have seen the benefits of being part them.
- To improve marketing opportunities, increase income, and to share ideas and learn more from fellow

sawmillers

- Newly retired with time to potter and do more timber activities
- To work with others that have shared issues/challenges
- Sharing knowledge on milling different species of trees
- My life is busy enough without getting involved with another organization. sorry
- might help my venture get off the ground
- More local cooperation
- Already with FFT, but a wider association might be more effective
- To learn from and exchange insights with others in the same situation
- probably
- Farm forestry works well in general ... good sort of model. Not too much travel preferred but one or two good fielddays a year with hands on stuff, a mixture of theory and practise would be good. Theory could be done online first. I'd pay a bit for this.
- I enjoy knowing what others are sawing and where wood is going, like macrocarpa beams 300x65x 6m were sawn off this farm and erected for food on 2 story house a few days later.
  Then miller is sawing, visible from road , guy walks in and wants so 3 mm timber to make a guitar.
  So miller experiences and what happens to those one off trees.
- Photos and experiences useing various nz grown timbers
- To find millers and potential markets.
- To gain and improve access to markets
- Would like to support planting, milling of marketing trees that are an alternative to pine
- To ensure sustainable native forestry is well represented
- Provided the group is market focused and not merely a talk-shop.
- Too much currently on my plate
- Increase interactions and networking
- It would be good have some joint initiatives to raise the profile NZ grown alternative timbers
- Passionate belief in the long term future of the industry.
- I think it's long overdue and nzffa does not suit sawmillers
- To connect with others , to share resources and connections
- We have been in this Industry Since 1994 and BATTLED our way to here ....I Struggle to have enough time to do what we are already doing without increasing Work load of ANY Description...I am Very much a ..love Many ..Trust a Few...and Row my Own Canoe (Waka) Person...
- As stated, not milling anymore and now only selling existing stock. Otherwise would definitely be interested.
- Maybe! Depends on structure and potential effectiveness.
- To see this part of the sector get some proper traction in the domestic market
- Because using wood instead of energy intensive/polluting alternatives is part of the path way to a sustainable future.
- Possibly although not sure fit my business model as have very little in common with portable sawmiller
- It must be a good idea however my experience has been that small scale millers are very independent and rarely like to work towards a 'common good'. This may be because most of them are on the breadline.
- I thought we already had this?? If not then possibly.

Appendix 6: The complete survey

Developing New Zealand's alternative timbers and small-scale sawmilling industry
Please complete our short survey.
Hi there! If you own or operate a small sawmill (e.g. Peterson, Mahoe, Turbo, Wood-Mizer, Lucas etc), or use a contract sawmiller, we would like your opinion about an initiative to establish an industry association for small-scale sawmillers and others working with alternative (sometimes called 'specialty') NZ timbers. Responding to this survey will help us to understand your activities and role in the industry, your concerns about the industry, and how an association could help resolve them. Your responses are important in providing an early indicator of the likely support for an association that could assist practitioners in areas such as branding, marketing, health and safety, training and product development.
Ideally, we would like the business owner or senior manager to complete the survey that will take no longer than 10 minutes. Your identity and responses will be anonymous and confidential.

1. Name Business name if any Email address	
2. Is small-scale sawmilling a major part of your business?	Yes/No If Yes, please go to Question 3 If No, please tell us about your involvement with the small-scale sawmilling/alternative timbers industry and then go straight to Question 15:
3. Is your sawmilling operation or the the sawmiller you use	○ commercial full-time (3 or more employees) ○ commercial full-time (sole trader/partnership ○ commercial part-time i.e. regular use throughout year ○ commercial occasional ○ non-commercial/hobby ○ Other:
4. Do you or your business operate	○ at a permanent base using a contract sawmiller ○ at a permanent base only ○ at a permanent base and also mobile ○ mobile only (i.e. only mill on other people's properties)
5. If you work at a permanent base where do you get logs from?	
6. If mobile, what region do you cover?	
7. What make and model of mill/mills do you/your contract sawmiller	

	operate?	
8.	What species do you mainly mill?	(tick as many as apply) ○ macrocarpa ○ other cypresses (e.g. lawsons, lusitanica) ○ radiata pine ○ redwood ○ eucalypts ○ blackwood ○ poplar ○ native species ○ Others – please list below:
9.	If you operate from a permanent base (either with your own sawmill or using a contract sawmiller), please estimate the volumes of softwood and hardwood timber you mill annually (in tonnes or cubic metres)	Softwood Hardwood
10.	If you are a mobile sawmiller, please give a rough estimate of the volumes of softwood and hardwood timber you mill annually (in tonnes or cubic metres).	Softwood Hardwood
11.	Do you undertake any further processing following milling?	Yes/No If Yes – what processing? (tick all that apply) ○ kiln-drying ○ timber treatment ○ re-sawing ○ profiling ○ joinery ○ other … (please describe below)
12.	Where does the timber you mill go?	(tick all that apply) ○ Original forest owner/farmer whose trees they were ○ Sold to timber merchants ○ Sold to timber retailers – e.g. Bunnings, Mitre 10 etc ○ Sold directly to end users – e.g. joiners, builders, DiY market ○ Other – please describe below
13.	How do you publicise your services and/or the timber you market?	(tick all that apply) ○ No publicity – only 'word of mouth' ○ Yellow pages ○ Business web site ○ On-line websites/directories e.g. Trade-Me, Farm Forestry Timbers, Builders Crack etc ○ By attending events/field days ○ Direct marketing e.g. flyer drops In local area ○ Other - please describe below
14.	Have you had any sawmilling training other than 'on-the-job' training?	Yes/No If yes please give details:

15. How satisfied are you with the small-scale sawmilling industry?	○ Very Satisfied ○ Satisfied ○ Ok ○ Dissatisfied ○ Very Dissatisfied
16. What are some of the problems you face in your sawmilling work?	Please specify top 3: a) b) c)
17. What are some potential solutions you would like to see in the industry?	Please specify top 3: a) b) c)
18. What kind of support would you like to receive from other stakeholders to help grow your business and to help the industry as a whole (e.g. from suppliers, manufacturers, retailers, government, end-users)?	You may choose all that apply: ○ Financial support from Government ○ Branding and marketing campaigns ○ Industry collaboration and coordination ○ Increased domestic manufacturing ○ 'Wood first' construction policies from national/regional authorities ○ Training ○ Long-term contracts suited to small scale sawmilling ○ Rewards for creating employment ○ Others:
19. Are you a member of any relevant industry association?	(tick all that apply) • Arboricultural Association • Farm Forestry Association • Other (please name):
20. Would you be interested in joining an industry association for people involved in sawmilling and working with alternative/specialty timbers, as described in the discussion document?	Yes/No Please state the reason for your answer:
21. What services do you think an association could most usefully offer small-scale sawmillers of alternative (specialty) timbers?	(tick all that apply) ○ developing a NZ wide-network of professional sawmillers and businesses that are supported by a web site, promotion, and marketing events ○ developing branding and collaborative marketing ○ introducing 'chain of custody' certification and 'approved operator' schemes ○ developing best practice in Health and Safety and employment responsibilities ○ developing and promoting alternative species grading and standards ○ attracting new entrants through developing career opportunities based on formal education and training pathways ○ introducing practitioner events, training, and annual awards across the value chain

	○ research and product development ○ other (please describe):
22. Any other comments/feedback/ concerns on the discussion document and the plans to develop a small-scale sawmiller's association?	
23. What is your gender?	○ Male ○ Female ○ Prefer not to say
24. What is your age?	○ Under 18 ○ 19- 25 ○ 26- 35 ○ 36- 45 ○ 46-55 ○ 56- 65 ○ 66- 75 ○ Over 76 ○ Prefer not to say
25. What is your highest level of education	○ Attended secondary school but did not finish ○ Secondary school qualifications ○ Attended tertiary education but did not finish ○ Vocational/technical degree or certificate ○ Bachelor's degree ○ Master's degree ○ Doctorate ○ Prefer not to say
26. What is your expected annual gross income from your sawmilling business (i.e. before tax and expenses)?	○ Under $25,000 ○ $25,001 – $40,000 ○ $40,001 – $50,000 ○ $50,001 – $75,000 ○ $75,001 – $100,000 ○ $100,001 – $125,000 ○ $125,001 – $150,000 ○ $150,001 – $175,000 ○ $175,001 – $200,000 ○ Over $200,000 ○ Prefer not to say/not applicable
27. Can we contact you again to discuss this idea further?	Yes/No

Many thanks for completing our survey.
All information will be kept entirely confidential.

Appendix 7: Timber merchant's response

(This survey is included with the permission of Mark McKenzie)

Q1: Please tell us who you are.

- Name: Mark McKenzie
- Business name (if any): Timbers Of New Zealand Ltd.

Q2: Is buying and selling both NZ-grown and imported timber a major part of your business?

- Yes - please continue to Question 3

Q3: How would you describe your business?

- Timber merchant

Q4: Is your business

- commercial, full-time (3 or more employees)

Q5: How does your business operate?

- From a permanent base with a retail outlet and with on-line sales

Q6: Is buying and selling NZ-grown alternative ('specialty') timber a part of your business?

- Yes
- Q7: What proportion of your timber sales in terms of volume are NZ-grown timbers?
- 60-80%

Q8: What proportion of your timber sales in terms of value are NZ-grown timbers?

- 60-80%

Q9: What NZ specialty species do you mainly trade in? (tick as many as apply)

- macrocarpa
- redwood
- eucalypts
- native species
- Other (please specify):
- oak, elm, larch, ash.

Q10: Where do you source NZ-grown specialty timber from? (tick as many as apply)

- Direct from growers as logs
- From local sawmiller/s
- From other timber merchants

Q11: Do you have any processing facilities of your own? (tick all that apply)

- Other (please describe):
- We control processing but mostly on contract basis.

Q12: Who are your main customers? (please rank with 1 being most important)

- Other timber merchants
  3
- Timber retailers - e.g. Bunnings, Mitre 10 etc
  2
- End users (e.g. joiners, builders, DiY market)
  1

Q13: Please rank the NZ-grown timbers you sell by value (1 = greatest value, 8 = least value)

- macrocarpa
  3
- redwood
  5
- eucalypts
  4

- native timbers

2

- Others

1

Q14: What are the main grades of timber you sell? (tick all that apply)

- No. 1 clears
- No. 2 clears
- Dressing
- Merchant
- Sleeper

Q15: What do you think are the most common end-uses of the timber you sell? (tick all that apply)

- Indoor joinery
- Flooring
- Outdoor joinery - e.g. decks, landscaping
- Furniture
- Other specialty uses (please specify):
- weatherboard

Q16: How would you describe the current demand for NZ-grown timbers?

- Strong

Q17: How would you describe the supply of NZ-grown timbers from your sources?

- I can only sometimes obtain a consistent supply of the NZ-grown timber and the quality of timber I want
- Please comment:
- Very much depends on the timber. Good quality NZ grown hardwoods, redwood, larch & some natives are only sometimes available. Macrocarpa, lawson cypress, some eucalypts, some natives are readily available.

Q18: How do you feel about the future of the NZ-grown specialty timber industry?

- Positive – I think both supply and demand will increase somewhat
- Please comment on your answer:
- The current market trend is increasing. Supply depends on the species:. macrocarpa seems to continue despite opposite predictions, good quality NZ hardwoods supply is sporadic. supply of rimu and matai natives is reducing but beech is Ok. good quality redwood is expensive. Larch is sporadic.

Q19: Do your customers demand certified timber (e.g. FSC of PEFC-certified)?

- Sometimes

Q20: How satisfied are you with the NZ specialty timbers supply chain?

- Neither satisfied nor dissatisfied

Q21: What are some of the problems you face as a timber merchant dealing with NZ-grown specialty timbers? Please specify the top 3:

- a) Acceptance of lower grades by the market
- b) Acceptance for certain uses by architects and builders
- c) Supply of some is sporadic

Q22: What are some potential solutions/improvements you would like to see in the NZ specialty timbers supply chain? Please specify the top 3

- a) Maybe a buy / sell database for woodlots, logs and green timber
- b) Regular social/ collegial get togethers of participants at a regional level.

Q23: What kind of support would you like to receive from other stakeholders to help grow your business and to help the industry as a whole (e.g. from suppliers, manufacturers, retailers, government, end-users)? (tick all that apply)

- Industry collaboration and coordination
- 'Wood first' policies from national/regional authorities
- Other (please specify):

- Retention and increase in regulatory acceptance especially at a Government level. Regular social/ business get togethers of stakeholders - Hoo Hoo association type meetings. Joint promotion to key market decision makers such as architects, building associations, joinery association, government buyers.

Q24: Are you a member of any relevant industry association?

- If yes, please specify which organisation/s:
- NZFFA, ATFA, CECC, NZIF (Assoc)

Q25: Would you be interested in supporting the establishment of an association for businesses in the NZ alternative/specialty timbers industry?

- Yes
- Please state the reason for your answer:
- Working together to promote NZ specialty timbers. With regard to gaining and retaining regulatory acceptance in building use. Improving the sustainability in production and then market acceptance of specialty timbers. Joint promotion of NZ speciality timbers.

Q26: What services do you think an association could most usefully offer timber merchants dealing with NZ-grown timbers? (Tick all that apply)

- introducing ‘chain of custody’ certification for NZ-grown timbers
- developing and promoting specialty species grading and standards
- research and product development

Q27: Do you have any other comments on the discussion document and plans to develop an industry association for people working with NZ-grown specialty timbers?

Important to work out areas that will improve the overall use of specialty timbers and benefit all levels of the speciality timber market. At one level its healthy that individual firms compete for market share and product development. From my experience a lot of money can be wasted on 'branding' with dubious returns. We mainly operate in marketing and sales of specialty timbers buying off sawmills. For timbers not readily available from sawmills or where sawmills are retaining most of the added value we buy logs.