

Advancing SA's Forest Industries: 2026 Master Plan Update

**A Review of the South Australian
Wood Fibre and Timber Industry
Master Plan**



Government
of South Australia



Advancing SA's Forest Industries: 2026 Master Plan Update

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South Australian Wood Fibre and Timber Industry Master Plan Review



The South Australian Wood Fibre and Timber Industry Master Plan (the Master Plan) was released in February 2024 by the Minister for Forest Industries, the Hon Clare Scriven MLC.

Guided by the Master Plan's three goals – the right resource and capability, a future focused workforce and a clean green economy – industry and government have made considerable investment in priority projects identified by the Forest Industries Advisory Council of South Australia (FIAC-SA).

Recognised as a living document, regular review of the Master Plan enables priorities to keep pace with socioeconomic and environmental changes that influence the industry, particularly in areas such as international trade, climate change and technological developments. Industry have summarised key aspects considered for this review.

Current Market Conditions and Context

The Advancing SA's Forest Industries: 2026 Master Plan Update comes at a time of both reflection and renewal, with the industry celebrating its 150th anniversary while navigating a period of significant change and opportunity. Domestically and globally, shifting economic and environmental conditions continue to influence markets, supply chains, and investment decisions. Against this challenging backdrop, South Australia's forest industries continue to demonstrate resilience, innovation and leadership.

Economic and Social Context

The past year has seen continuing volatility in international trade, with geopolitical tensions, freight pressures and tariffs reshaping global wood product flows. Domestically, housing construction activity has begun to recover; however, new commencements are being met largely by imported timber and steel substitutes. Medium-term forecasts point to renewed demand, driven by population growth and both State and Federal Government efforts to increase affordable housing supply.



At the same time, rising community and government expectations for sustainably produced, locally manufactured materials are strengthening the value proposition for plantation timber and regional processing. Critically, the industry is investing in its future, from OneFortyOne's new renewable energy project that will take the Jubilee Mill off-grid, to Borg's expanded operations and new shed – the largest in the southern hemisphere, advancing renewable biofuels and Sustainable Aviation Fuel production to help power a decarbonised future.

Across regional South Australia, the forest industries continue to anchor economic activity, supporting tens of thousands of jobs and underpinning secondary industries including logistics, transport, engineering, advanced manufacturing, and construction. The workforce challenge remains a key priority, with industry and government jointly investing in training pathways, school engagement and upskilling programs to attract and develop the next generation of forest professionals.

Environmental Context

Drier-than-average conditions throughout 2024 and 2025 have heightened the importance of biosecurity and resilience, with a strong focus on eradicating the Giant Pine Scale outbreak in Adelaide and addressing drought-stress-induced Diplodia, water security, and bushfire preparedness across the plantation estate.

Climate variability, coupled with longer fire seasons, underscores the importance of continued investment in risk mitigation, innovation and technology – from AI-powered bushfire detection networks to decarbonised freight solutions. In addition, the release of South Australia's Net Zero Strategy (February 2025) provides a clear policy framework for industry to accelerate its transition to a low-emissions, circular economy.

Progress toward Master Plan Goals, funded by the South Australian Government

FIAC-SA has completed a review of the Master Plan. This supplementary document highlights progress that has been made under the Master Plan goals and reaffirms FIAC-SA's priorities, in light of emerging considerations. The Master Plan Goals remain appropriate, and several priority projects have been progressed as outlined in this update. The summary table highlights realised projects as well as gaps in project delivery.

Master Plan Priorities

Goal 1 The Right Resource and Capability	Goal 2 A Future Focused Workforce	Goal 3 A Clean Green Circular Economy
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Reviewed Priority Projects

The Value Proposition for Plantations PROJECTS FUNDED	Standardise Firefighting Training PROJECTS FUNDED	Building a Circular Economy PROJECTS FUNDED
Next Generation biomass PROJECTS FUNDED	Workforce Development strategy PROJECTS FUNDED	Forestry Renewables Roadmap GAP IDENTIFIED
Digital Economy plan GAP IDENTIFIED	Forestry Trainers and Assessors for Targeted Courses GAP IDENTIFIED	Green Fleet Exploration PROJECTS FUNDED
Long Term Impacts of Fire on the Plantation Estate GAP IDENTIFIED	Building a Workforce of Tomorrow PROJECTS FUNDED	High Productivity Freight Vehicle Digital Network GAP IDENTIFIED

Goal 1

The Right Resource and Capability

The Value Proposition for Plantations

(Response to Strategic Action 1.b)
FUNDED - \$70,000.

The South Australian Forest Products Association (SAFPA) delivered the State of the South Australia's Plantation Forests Report, which provides an in depth understanding of future wood fibre supply and demand. The project profiled hardwood and softwood fibre across the plantation estate and modelled the future fibre demand for uses such as house frames, agricultural posts and poles, pallets, particleboard and biomass. The report highlights SA's key role in the nation's wood supply, its high percentage of local processing, and the likely gap between future demand and timber supply.

(Response to Strategic Action 1.b)
FUNDED - \$125,000.

To support the showcase of local timber and improve society's knowledge of the positive contributions of forest industries, funding of \$125,000 from the Master Plan was allocated toward the Forestry Centre of Excellence building.

Next Generation Biomass

(Response to Strategic Action 1.c)
FUNDED - \$140,000

The Monarto Fibre Precinct project includes a biomass investigation to understand fibre availability by volume, characteristic and value across metropolitan Adelaide, information that will then feed into a precinct feasibility study for Monarto.

Goal 2

A Future Focused Workforce

Standardise Firefighting Training

(Response to Strategic Action 2.a)
FUNDED - \$227,200

ForestWorks is working closely with the Country Fire Service (CFS) and Country Fire Authority (CFA) to standardise firefighting training across the South Australian and Victorian border. Broad stakeholder engagement will establish forest firefighting skill requirements and training pathways to achieve them.

Workforce Development Strategy

(Response to Strategic Action 2.b)
FUNDED - \$300,000

The Green Triangle Forest Industries Hub (GTFIH) will implement their new Workforce Development Program that is set to include professional development for career advisers and teachers, direct student engagement, skills centre development and engagement with First Nations communities.

(Response to Strategic Actions 2.b and 2.f)
FUNDED - \$145,500

ForestWorks' Megatrends in Careers in Forestry project recognises that digitisation, automation and AI are reshaping forestry and wood products, creating productivity opportunities for the Green Triangle and guiding industry and training providers to prepare for them.

Building a Workforce of Tomorrow

(Response to Strategic Actions 2.d, 2e and 2.f)
FUNDED - \$250,000

SAFPA's 'This is Wood Work' program showcases diverse career opportunities in the forestry sectors ranging from Forest Management, to Harvesting and Haulage, Sawmilling and Wood Production through to Corporate Services.

Goal 3

A Clean Green Circular Economy

Building a Circular Economy

(Response to Strategic Action 3.a and 3.b)
FUNDED - \$200,000

The South Australian Wine Industry Association (SAWIA) in consultation with the Treated Timber Product Stewardship Working Group, is supporting the sustainable waste management of CCA (copper chrome arsenate) treated timber through the development of a national stewardship framework to address the reuse, recovery, management and safe disposal of treated timber. An additional \$600,000 is funded by the South Australian Wine Recovery Program.

(Response to Strategic Action 3.b)
FUNDED - \$142,300

SAFPA's Timber Promotion Campaign: Supporting Decarbonisation, Domestic Manufacturing and Market Growth project is designed to drive deeper understanding of the importance of our state's forest industries and their role in a sustainable, sovereign manufacturing future. The project aims to promote South Australian manufacturing, grow market confidence and demand, and highlight timber's decarbonisation role. An additional \$92,700 is funded by the Thriving Regions Strengthening Industries stream.

Green Fleet Exploration

(Response to Strategic Action 3.d)
FUNDED - \$200,000

SAFPA and Tabeel Trading's joint Decarbonising the Freight Task project aims to reduce reliance on diesel and deliver substantial carbon savings, driving the sector's transition to a low-carbon future. It will develop a comprehensive evidence-based decarbonisation roadmap for South Australia's forest freight fleet and a detailed cost-benefit analysis of alternative freight technologies, including the modelling of emission reductions.

(Response to Strategic Action 3.d)
FUNDED - \$200,000

Fennell Forestry's electric log truck trial examined how heavy vehicle decarbonisation can contribute towards a green circular economy, building on the outcomes of initial trials in 2023 that tested Australia's first electric heavy vehicle. The trial demonstrated substantial reduction in carbon emissions while assessing critical issues and providing key insights on aspects such as range, charging infrastructure and the skill requirements and Work Health and Safety benefits for drivers.

Additional Achievements Across Master Plan Goals

FIAC-SA recognises that not all progress under the Master Plan is via its funded projects: industry organisations and government agencies continue to deliver impactful projects that progress the goals of the Master Plan. The past two years have been defined by significant progress across the Master Plan's goals, reflecting the strong partnership between industry and government.



Additional Achievements

Goal 1

The Right Resource and Capability

A process to amend the Lower Limestone Coast Water Allocation Plan commenced in March 2024 and is expected to run until December 2027. The forest industries remain actively engaged in the amendment process and are represented on the Lower Limestone Coast Water Allocation Plan Amendment Stakeholder Advisory Group across both hardwood and softwood sectors. (Relates to Strategic Actions 1.a and 1.e)

Borg is constructing a large state-of-the-art particleboard and MDF production line at its Mount Gambier site, with the new particleboard line expected to have an annual capacity of more than 650,000 m³, making it the largest of its kind in Australia. The project also includes extensive manufacturing and logistics infrastructure. (Relates to Strategic Action 1.c)

Research and training capacity has been strengthened with the establishment of the Forestry Centre of Excellence, the appointment of Professor Jeffrey Morrell as Director, and construction of its new building in Mount Gambier. (Relates to Strategic Action 1.c)

A project to boost mobile phone coverage in the Limestone Coast is underway, with \$15 million Australian Government and \$5.5 million South Australian Government funding. The project was developed in consultation with the forestry industry and will deliver 27 new mobile sites, providing improved connectivity across the Limestone Coast region. (Relates to Strategic Action 1.d)

The industry has developed its bushfire detection camera network across the Green Triangle region, supported by funding from the South Australian Government. Introduced as part of the State Government's \$2.346 million upgrade of fire towers in the region, the technology investment in the Green Triangle enables rapid, accurate fire detection, safeguarding communities and vital plantation forests. Operation of the network is funded largely by industry. (Relates to Strategic Action 1.f)



Following outcomes from the \$1.3 million Australian Government funding for the Agricultural Trade and Market Access Cooperation (ATMAC) Program, companies are innovating to utilise lower value pulp log material otherwise exported as wood chip. The Future Fibre – Hardwood Timber Manufacturing Hub Feasibility Study, facilitated by a \$500,000 Victorian Government investment through the Portland Diversification Fund, is enabling the Green Triangle Forest Industries Hub to investigate whether glue laminated timber and laminated veneer lumber could play a role in meeting Australia's growing demand for construction grade timber products. (Relates to Strategic Action 1.g)

South Australian recipients have secured \$1.2 million of the Australian Government's Support Plantation Establishment Program committed across Australia over three grant rounds to November 2025. (Relates to Strategic Action 1.h)

PIRSA is investing \$450,000 with Tree Breeding Australia to support the construction of a dedicated facility in Mount Gambier. The \$1.1 million facility will support more effective gene conservation services and national tree improvement programs for plantation and farm forestry. (Relates to Strategic Action 1.h)

OneFortyOne completed an \$8 million upgrade at Glencoe Nursery, modernising critical propagation infrastructure to boost tree-planting capacity and improve seedling quality. (Relates to Strategic Action 1.h)

2025 marked 150 years of plantation forestry in South Australia and industry celebrated the milestone with a 150th Anniversary Gala Dinner attended by the Premier and Minister for Forest Industries, highlighting the sector's enduring contribution to the State.

Additional Achievements

Goal 2

A Future Focused Workforce

The Australian Government's \$10 million Forestry Workforce Training Program tender was awarded to ForestWorks to deliver the Forestry Workforce Training Program. The program provides activities to improve qualification and credentials access for the sector including pilot projects and trials such as a school-to-work traineeship transition program, mentorship for Indigenous Australians and women, and improving training in remote and regional Australia. (Relates to Strategic Action 2.c)

The South Australian Government is investing a record \$1.44 billion, on top of an additional \$880 million from the Commonwealth, as part of the National Skills Agreement (NSA), to ensure apprentices and trainees are being trained in the sectors South Australia needs most. (Relates to Strategic Action 2.c).

The Department of Transport and Infrastructure introduced a new Multi Combination (MC) Licence Program to provide flexibility and enhance driver competency and road safety. Eligible drivers who do not have the minimum experience can access an alternative pathway for an MC licence, completing a structured learning program with their employer's support. (Relates to Strategic Action 2.d)

The State Government has invested \$208 million to build five technical colleges in South Australia, three of which will be opened in metropolitan Adelaide, one in Port Augusta and one in Mount Gambier, by 2026. Construction of these state-of-the-art learning environments includes the first mass CLT & GLT project in the state constructed using locally grown, harvested and processed timber. (Relates to Strategic Action 2.d)

Master Builders SA launched their Born to Build program promoting the variety of career pathways and options within the building and construction industry, which complements SAFPA's 'This is Wood Work' program. (Relates to Strategic Action 2.e)

Goal 3

A Clean Green Circular Economy



PIRSA and Green Industries SA (GISA) co-invested \$49,405 for Rawtec to undertake a CCA post aggregation feasibility study, which was commissioned by Wine Australia and assessed potential treated post collection points to facilitate efficient and responsible CCA disposal in SA wine regions. (Relates to Strategic Actions 3.a and 3.b)

OneFortyOne announced an investment of approximately \$30 million in a biomass power generation project at its Jubilee Sawmill. With an estimated annual renewable electricity generation of 43,800 mWh, the new turbine is expected to power the entire Mount Gambier sawmill. (Relates to Strategic Action 3.c)

The Department of Infrastructure and Transport is leading the refresh of the Green Triangle Freight Action Plan (GTFAP) with the support of the wider GTFAP Working Group, including representatives of the softwood and hardwood industry. The refresh proposes to include a woodflow mapping process to provide an evidence base for infrastructure investment. (Relates to Strategic Action 3.d)



FIAC-SA current membership

Tammy Auld, Co-chair

Michelle Ingley-Smith, Co-chair

John Forster, South Australian Forest Products Association

David Quill, South Australian Timber Processors Association

Alicia Langfield, National Timber and Hardware Association

Laurie Hein, Green Triangle Forest Industries Hub

Adrian Flowers, Green Triangle Forest Contractors Group

Cathy Bell, OneFortyOne Wood Products, TFTU employee representative

Gail McMillan, Timberlink Australia, TFTU employee representative

Travis Lawson, Timber, Furnishing and Textiles Union

Jo Collins, Department of Primary Industries and Regions

Dan Jordan, Department for Environment and Water

Andrew Dunbar, Department of State Development

Andrew Excell, Department for Infrastructure and Transport

Vanessa McLoughlin, Department of Treasury and Finance



Thank you to previous FIAC-SA members

Greg Boulton, South Australian Forest Products Association

Peter Badenoch, South Australian Timber Processors Association

Peter Hewlett, Timberlink Australia

Wendy Fennell, Green Triangle Forest Contractors Group

Prof Mehdi Doroudi, Department of Primary Industries and Regions

Sandy Burness, Department of Treasury and Finance



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