

Ireland – changes in agricultural policy and their impact on private forestry

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Summary

The reform of the Common Agricultural Policy has introduced a number of possibly conflicting schemes in the area of land use. Many of these schemes impinge on the forestry programme. All land that goes to forestry is dependent on the decisions of individual farmers to sell or to plant themselves. The level of farmer forestry, indeed, the whole level of new afforestation may be controlled by the interaction of these schemes. Coillte will continue to plant new land probably of better quality than that of the Forest Service in the past. The investment companies are not likely to be major players in new afforestation unless there is a change in investor type. There is an increasing tendency for farmers to plant their own land. If farmer forestry is to become a major component in the afforestation drive then the level of grants and other supports must be competitive – or somewhat more attractive – than those which allow a farmer to remain in agriculture.

Introduction

The reform of the Common Agricultural Policy (CAP) and its effect on Irish agriculture is difficult to measure precisely. The reform measures themselves, superimposed on the measures that are already there, form a complex intertwined network of quotas, restrictions, subsidies and direct payments. While their intent as individual EU/Irish Government Regulations may be clear, their impact as a group (of possibly conflicting supports and requirements) in practice may have a combined effect greater or less than that originally intended. Only after the first year or so under the reformed CAP regulations will the pattern of effects become clear. The major thrust of the reform measures are to reduce

agricultural output, reduce direct price support for a wide range of agricultural products, and, through direct payments to farmers, to support the producer and not the product.

It must be clearly understood that the measures in the CAP are designed to impact on agriculture. Forestry and the promotion of forestry, in as much as it enters into the CAP, is seen purely as an alternative use to remove land out of agricultural production. The EU does not have a forest policy as such, it has an agricultural policy. Also, while some measures – such as the Forestry Operational Programme – definitely promote forestry, others – such as the extensification measures and the arrangements for set-aside or the workings of the retirement scheme –

definitely militate against encouraging farmers into forestry. The likely impact of these regulations is to increase farm income without increasing output. This makes these schemes very attractive to farmers. EU measures conflict – or counterbalance each other – and farmers may hesitate to plant.

It would appear that the confidence that is currently there in the private forestry scene, while not ephemeral, is a very brittle and insubstantial thing – heavily dependent on grants and premia. It is also important how these grants and premia compare to other alternative EU agricultural supports. Forestry – but particularly afforestation – is at the crossroads. Those who

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make the key decisions must act swiftly and decisively, to knit the threads of the current complex web of measures into a coherent package to promote forestry. This should be simplified now that all the players are in the one government department for the first time in 60 odd years. The momentum that has been built up can just as easily be dissipated – confidence among farmers is a tenuous thing that can be destroyed by hesitation, parsimony or delay.

Afforestation is no longer a matter for state officials to act as purchasers of last resort and planters of marginal land. This role has now been inherited by Coillte whose estate now acts as the bedrock of Irish forestry. Coillte, however must assess each purchase on its economic or strategic merits and so will seek the most productive land it can afford to buy. Thus the most marginal lands are likely to be left unplanted. The private forestry sector, which state officials now directly ‘control’, is equally if not more important for the future direction of Irish forestry. Private but especially farmer forestry is particularly ‘market led’. On the financial side, in the case of farmers, it is not so much Internal Rate of Return or Net Discounted Revenue that is important but annual “cash flow” through the grants and premium that influence decisions about land use. But there are many more complex reasons including: farm size, farm enterprise, stage in life cycle, age, location in the east or west of the country, and degree of dependence on state welfare or other supports, which may have a greater influence on farmers decisions about forestry.

This paper looks at a number of issues relating to the potential level of private but more specifically farmer forestry. As the figures will show farm forestry, whatever its faults and drawbacks, is now a major third element, with the potential to be the major force in the afforestation programme. The other two elements are Coillte and the large private investment funds. It is likely that farm forestry will, in the future, form a greater portion of private afforestation than all types of investment forestry.

| | 1987 Ha/An | |
|----------|---------------|--|
| Benelux | 200 | From 1987 to 1992, Ireland planted the largest percentage of land in the EU. Afforestation rates for 1989, 91 and 92 were 15,220, 19,250 and 16,740 ha respectively |
| Denmark | 300 | |
| Germany | 500 | |
| Greece | 4,000 | |
| Portugal | 5,000 | |
| Ireland | 8,500* | The relatively high afforestation rates for the UK in 1987 have not been maintained – there has in fact been a large decrease in subsequent planting figures due to change in tax law. |
| France | 10,000 | |
| Italy | 19,500 | |
| UK | 23,358 | |
| Spain | 67,000 | |

*Omits reforestation

Table 1:
*Net
afforestation
rates for the EU*

Place of new afforestation in Europe

Currently Irish forestry amounts to only one percent of the total EU forest area. Even if we double our area of forestry we will control only a very insignificant area of European forestry. While our total area of forestry may not be impressive, our rate of planting certainly is (Table 1). Next to Spain we are now planting the greatest total area of land of the 12 EU countries. On a percentage of total land area we have the fastest planting rate – planting some one third of one percent of our total land area per annum – this, indeed, may be one of the fastest planting rates in the world.

The CAP reform measures are designed to be effective at European wide level. While the agricultural measures will impact over most of the community the ability for certain countries to adopt forestry measures is more limited. Belgium currently has a variety of legal restrictions which make afforestation particularly difficult for any landowner (Lust, N., and Muys, B., 1993). Holland has little area to contribute to forestry and most of this

goes towards amenity and recreational purposes to cater for the needs of the huge population (Swellengrebel, E. J. G., 1993). Germany may find it difficult for a wide number of reasons to increase their forest area except in the former German Democratic Republic (Weber, 1993). Other countries, while putting strenuous efforts into increasing their forest area, may have particular problems. Very small holding sizes and fragmentation of holdings, on a scale unknown in Ireland, pose problems for certain areas in France, Italy, Spain and Portugal. If the forestry measures are seen to falter in those countries, like the UK, Spain, Portugal, France and Ireland, where most is expected, then the efficacy and utility of afforestation measures, as a means to reduce agricultural output, may be called into question at Commission level.

Building confidence

It is imperative that the momentum of Irish private afforestation be maintained. If this requires changes in grant levels or duration, targeting of

grants at specific regions or species, improved advisory services or more vigorous promotion then this should be done. Confidence in Irish forestry must not only be maintained in Ireland but also in Brussels. It is vital that the socio-political decisions on rural welfare, which are made in Brussels, include and continue to support forestry. Kearney has shown how the new CAP measures act to make forestry less competitive – they must be counteracted as quickly as possible (Kearney, B., 1993). We cannot let a climate of doubt or delay allow a reduction in the momentum that has been built up. Once farmers lose confidence in forestry then that confidence will be harder to restore than it was to build originally.

Ownership of future forest land

All land which is afforested in Ireland is or was owned by farmers or their inheritors. Whether this land is sold to Coillte, investment institutions or other private investors or whether the farmer himself plants his land there is still a major change of land use. Analysis of the wider implications of such a change is essential information on which to base any policy for the wider use of land. If land use policy is not driven by fact then it will be driven by sentiment.

There have been considerable

changes in the ownership pattern of newly afforested land since 1980. An analysis, however rudimentary, of these changes may give some clue as to the future trends in forest ownership. The effect of the various grants and support schemes can also be traced in their influence on the various categories of planters. If we are to meet the government's target of 30,000 hectares per annum then we must mobilise all organisations and individuals and maximise the areas they plant

Two tables are presented in this section analysing trends in the period 1982-1985 and 1986-1992. This section will concentrate on the 'private forestry' sector – the figures from the Forest Service/Coillte are included in as much as they shed light on the overall transfer of land to forestry. Two aspects of these tables throw some light on the future development of ownership patterns of new afforestation. The first point of interest is the relationship of 'farmer' to 'investor' planting for each of these years. Secondly, the proportion of farmer planting in relation to the total area afforested is of interest.

The period 1982-85 has been dealt with in a paper published in 1986 (Bulfin and Connolly, 1986). One table taken from this source has been modified for this paper and gives a detailed breakdown of the various types of own-

Table 2:
Private afforestation assisted by The Western Package Grant Scheme 1982-85

| <i>Year</i> | <i>Investor</i> | <i>Other</i> | <i>Farmer</i> | <i>Farmer as % of Private Planting</i> |
|-------------|-----------------|--------------|---------------|--|
| | <i>Ha</i> | <i>Ha</i> | <i>Ha</i> | <i>Ha</i> |
| 1982 | 15 | 85 | 88 | 47 |
| 1983 | 35 | 51 | 74 | 45 |
| 1984 | 67 | 108 | 110 | 38 |
| 1985 | 246 | 129 | 235 | 38 |

Source: Bulfin and Connolly, 1986

ers who planted in those years. The table, (Table 2), while dealing with quite small areas planted, has a better breakdown of detail between investor and 'other' categories. In this table 'investor' can be taken to indicate mainly the larger institutional investors, while 'others' covers all other non-farmer investors either absentee owners, local business persons etc. The table shows that over the period, farmer afforestation accounted for 41 percent, investors for 29 percent and others for 30 percent of the area planted. Overall the private sector only accounted for 8.7 percent of the total area planted as the Forest Service was still the major planting agency. Farmer planting accounted for 3.6 percent of the total land area planted. The major grant scheme in force at this time was the Western Package Scheme which was confined to the twelve western counties. This scheme, as well as the various agricultural supports it offered, included a grant scheme aimed at private afforestation particularly by farmers. The scheme became generally operational during 1981 and was to last for ten years. There was a planting target of 25,000 hectares set – a yearly target of 2,500 hectares.

By 1985, the half way mark had almost been reached in the Western

Package Scheme operational period and only 2,060 hectares of private forestry had been planted. Farmers, who were the prime target of the programme, were accounting for only 40 percent of Western Package planting.

Farmer planting

While some commentators may state that plantation forestry is only another form of farming, most farmers do not see forestry in that light. In The Leitrim Resource Survey of 1978 it was clearly stated that there were severe problems facing small farmers going into forestry as they would lose their annual income, however small, from agriculture as well as put at risk eligibility for state supports such as social welfare and health entitlements. The Leitrim Resource Survey Report, which was the first major agricultural/rural development survey to look seriously at forestry as a farm enterprise, advocated some form of annual payment for farmers. This payment, called the Annuity Purchase Scheme, which was based on the expected Yield Class of the forest crop, was to be paid by the state or some other agency, such as a pension fund. In return the state or funding agency would get a major portion of the crop at harvest (Bulfin, 1978). In 1986 Bulfin made the same

| Year | Total | Coillte | Private | Farmer | Farmer as Percent of Private | Farmer as Percent of Total |
|------|-------|---------|---------|--------|---------------------------------|-------------------------------|
| 1986 | 7249 | 4689 | 2560 | 461 | 18 | 6.3 |
| 1987 | 8608 | 5395 | 3213 | 771 | 24 | 9.0 |
| 1988 | 12376 | 7122 | 5254 | 1839 | 35 | 8.8 |
| 1989 | 15224 | 6625 | 8595 | 3868 | 45 | 25.4 |
| 1990 | 15886 | 6670 | 9216 | 3963 | 43 | 24.9 |
| 1991 | 19256 | 7855 | 11410 | 7981 | 70 | 41.4 |
| 1992 | 17182 | 7565 | 9617 | 5385 | 58 | 31.3 |

Table 3:
*Coillte private
and farmer
afforestation
1986-1992*

Source: Forest Service

arguments to the major European-wide study by the then EU's Forecasting and Assessment in Science and Technology (FAST) Programme on Forestry, entitled 'Forestry – The Challenge of the Future' and these were incorporated into the final FAST Reports (FAST, 1986). In 1987 further proposals for the development of farm forestry were made as part of the final report of a research project commissioned by the EU entitled 'Determining The Role Of Private Forestry On Highly Productive Forest Sites In Agriculturally Disadvantaged Areas'. The basic supports as seen by this Report that were necessary to stimulate farmer forestry were:

- increased planting grants,
- an active advisory service,
- demonstration farm forests,
- a forestry co-operative support network,
- but the most essential element was seen as some form of annual income. (Bulfin, 1987).

Table 3 deals with the period 1986 to 1992 and shows a very different pattern emerging in the private forestry sector. With the restrictions on agricultural production increasing and prices decreasing farmers were beginning to look seriously for alternative enterprises. EU policy was beginning to offer incentives to help farmers to move into alternative enterprises. The Compensatory Headage Payments, to farmers who switched land to forestry, were the first faltering steps in this direction. But the headage payments, which are payments to farmers in disadvantaged areas to supplement their income, required that a farmer reduce his stock numbers before qualifying and had other restrictive elements.

The payments were fixed at £70 per hectare and would not replace income lost in complying with the required reduction in livestock numbers. Compensatory Headage Payments were

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aimed at reducing farm surpluses rather than encouraging forestry. The scheme was modified almost every year for the next few years but was never really attractive to farmers. The Compensatory Headage payments were too little and ran counter to the instinctive urge of farmers to produce agricultural goods.

The Premium Scheme introduced in the 1989/90 period was the first successful attempt to put a real annual income into the hands of farmers who planted. The whole series of new supports introduced in the Forestry Operational Programme 1989-93 have had a major influence on the afforestation programme. The structure of the grants also indicate that there were the beginnings of a land use policy being formulated by the Forest Service as indicated in the direction being adopted in the grants. There is a move away from the most marginal of soils and towards better quality land – perhaps a better quality of marginal agricultural land. The supports, both planting grants and premia also favour the use of broadleaves. As these grants are familiar to all through the excellent brochures issued by the Forest Service they need not be detailed here. Suffice

it to say we now have an active advisory service, a series of demonstration farms, the beginnings of a network of forestry co-operatives, a rapidly developing Timber Growers Association, improved and more directed grants and a respectable forestry premium scheme.

The combined effect of all these supports has been dramatic. Farmer planting has gone from 770 hectares in 1987 to 8,000 hectares in 1991. The really dramatic increases began in 1989 when the new supports were coming on stream. This represents some 70 percent of all private planting and 40 percent of all planting including Coillte – a very substantial contribution to the afforestation targets. Also of significance is the substantial drop in farmer planting to 5,300 hectares in 1992, part of which may be attributed to farmers holding off planting while waiting for the new grants to be introduced.

Not all farmers were eligible for the premium because between 1989 and 1991 there was an upper income limit of £11,000, which included spouse's income. This excluded some farmers especially in the better-off areas of the country, where many farmers would have greater incomes. In the western areas income from off-farm employ-

ment would push farmers above the limit. However, the limit was increased to £14,300 by 1991 and farmers whose income exceeded this level were eligible for a reduced premium of £50 per hectare rather than the full premium of £116 per hectare. In analysing the figures for the Farm Premium scheme, du Quesne (1993) stated that this revision has had an effect on premium applications. In recent years the number of beneficiaries rose from 21 in the second half of 1990 to 319 in 1991 and 643 in 1992 (du Quesne, 1993). In a further analysis, Table 4, of the area funded under the Premium scheme some interesting facts emerge about the type of land that is being supported under the premium scheme.

Table 4 emphasises even more, the implied effect of the increase in allowable income level and the reduced premium for those over the allowable limit for full premium. What is also of interest is the extent of 'unenclosed' land that is being planted. This is running at some 36 percent of the total conifer area. While this is a considerable improvement from the situation within the state forestry planting programme, even a few years ago, the intention of the Forest Service to encourage farmers to plant more of

| <i>Forest Type</i> | <i>1990 Ha</i> | <i>1991 Ha</i> | <i>1992 Ha</i> | <i>Total Ha</i> |
|-------------------------------------|--------------------|--------------------|--------------------|---------------------|
| Conifers | 175 | 2831 | 6313 | 9319 |
| of which Enclosed | 97 | 1937 | 3971 | 6004 |
| Unenclosed | 78 | 894 | 2343 | 3315 |
| Unenclosed as % of Total Conifer | 45 | 32 | 37 | 36 |
| Broadleaved | 10 | 27 | 122 | 159 |
| Total Forestry Premium | 185 | 2858 | 6436 | 9479 |

Table 4:
*Area approved
for the Forest
Premium
Scheme*

Source: Adapted from du Quesne, (1993), p 31

their 'enclosed' land has not been fully realised. An optimum ratio of one hectare of unenclosed land for every 9 hectares of enclosed land planted is suggested in this paper as an acceptable and achievable target.

The most important message to be taken from these figures is that farm forestry can be a sizeable contributor to the afforestation programme. However, farmers are extremely sensitive to the financial returns from forestry. But the financial returns they look to are the annual 'cash-flow' in the form of the premium. Net Discounted Revenue and Internal Rate of Return are of very little interest or significance to a farmer. Not that farmers are unaware of the growing capital asset which forestry represents but they have to be more pragmatic and weigh up their income on an annual basis. Their prime concern is to maximise their benefits from their land. Their main comparison is weighing up any losses from their reduction in agricultural output from the land transferred to forestry against the immediate gains under the premium. Of significance is that farmers are very responsive to grants but they are also a far more volatile group than any of the other players in the afforestation scene. Also whether they plant themselves or sell their land to others for afforestation is going to be of major importance to both Coillte and other investors. There is a finite amount of land available to come onto the market for afforestation each year – how much actually does will depend on the combined decisions of a very diverse group of farmers/landowners.

Afforestation by investors

The attitude of the investor and institutional market to forestry was

succinctly summarised by John Bruder of AIB Investment Managers in replying to Brendan Kearney's paper "Economic Issues in Irish Forestry" to the Statistical and Social Inquiry Society of Ireland in March 1993 (Bruder, 1993). In his presentation Bruder made three major points from an investors point of view.

(1) The Internal Rate of Return (IRR) to forestry (YC 20), estimated by Kearney at 5.1-6.6 percent depending on assumptions, was not considered good enough for investors, at a time when 'risk free' investments (Government gilts – early 1993) are yielding in excess of 7.5 percent. This would indicate a real rate of return in the short term of 4-5 percent when current inflation is taken into account. There is, therefore, no really sizeable financial attraction in forestry for the major investors.

(2) He indicated that from an investor's point-of-view there were major problems with forestry investment at present. Apart from the lack of real return there is also the problem that there is little or no market in immature (or for that matter semi-mature) forest properties. This lack of 'liquidity' or ability to realise assets quickly in forestry investment is a major problem for investment managers. Property investment, which also has a certain illiquidity to the cautious investment manager, needs to return 3-5 percent above the risk free rate of gilts. It is obvious that forestry, which is outside the everyday ken of investment managers and which would be regarded as a relatively risky investment, would need a considerably greater premium over risk free gilts. It is unlikely, therefore, that institutional

investors will play a major role in private forestry.

(3) However, Bruder did not rule out institutional investors investing in forestry. The flow of returns in forestry can prove acceptable for some types of investment portfolios. However, the percentage of any institution's portfolio devoted to forestry is likely to be very small. Bruder considers that forestry should not exceed more than one percent of a balanced investment

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portfolio. While such a percent may appear small in portfolio terms, if all investment managers were to follow suit then there would be a considerable impact on the land and afforestation markets. Yet most investment managers have not as yet gone into forestry and seem unlikely to do so in the future.

Property size was also a major stumbling block for investing institutions. The economics of scale, from their

point of view, require that properties of a certain minimum size are needed before the investment can be considered. AIB currently sets this minimum size at 40 hectares. Bulfin has shown that there are considerable difficulties with such size limitations (Bulfin, 1987a, Bulfin, 1993). To acquire blocks of this size whole farms must be bought or smaller farms amalgamated. A glance at the farm-size figures for most of the country indicate that there are very few farms in this category especially in the marginal land areas most often targeted for forestry. Normally the larger farms are the most viable and would be most capable of supporting a farm family and their removal from farming is least likely to happen. The exception to this is on the more marginal climatic peats and mountain areas, where larger farm units exist and occupants have in many cases been forced to seek off-farm employment. However, the afforestation of these areas has considerable drawbacks for investors, with longer rotations, poorer yields and greater risks.

Other possible major investors

While conventional pension fund investors are unlikely to make a great impact on future afforestation there remains two other possible sources of relatively large scale holdings being built by investors/processors. Hegarty (1993) in comments to Kearney's paper indicated that large EU forest investment companies may be interested in building up holdings in what they perceive to be a country with rapid growth rates and a rapidly developing forest infrastructure. This type of investor, who is more familiar with the forestry production cycle, may be more likely to invest for the long haul.

However, they will, in most cases, have to invest through the current management companies and will be competing for the same pool of land as Irish investors. These investors, who are familiar with forestry, are likely to require a better quality of forestry investment and will tend to seek a higher quality and more diverse estate management than just pure Sitka spruce. Most such investors will require a sizeable proportion of broadleaves and possibly an estate suitable for hunting and shooting. They look not just to the cash IRR but also to the value of the non-wood benefits such as the amenity, recreation and aesthetic value of their estate.

The second possible source of investors, with forestry based backgrounds, capable of building up holdings of significance, comes from the advent of new wood processors into the market. In some cases, whether for technical reasons of manufacture, or security of supply they may wish to build up a holding of forestry. It is more likely, whether they are trying to buffer or protect the continuity of their supply or provide a different type of processing material, that the type of

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forestry these investors will engage in will be based on shorter rotations – possibly with broadleaves. An example

of this type of contingency planning was the poplar plantations planned by Rauma for their proposed new plant in Northern Ireland.

Overall large scale investors are likely to account for not more than 10 percent of private forestry planting. Other ‘investors’ such as absentee owners, local business and professional people, and farmers themselves buying other farms for planting are likely to account for 20-30 percent of planting. Therefore, it is estimated that farmers planting their own land will account for 50-70 percent of all private planting. Thus, the total level of private planting will be greatly dependent on the rate of farmer planting.

Conclusion

If national planting targets are to be met then a considerable increase in farmer planting must be stimulated. This requires continuous monitoring, not just of the forestry supports but of their comparative attractiveness vis-à-vis their agricultural equivalents. The level playing field will be hard to achieve against the weight of the agricultural lobby. Of particular concern apart from the greatly increased rate of direct payments is the new extensification premium, the retirement scheme and the current set-aside regulations. Considerable efforts will need to be made in the support services to farmer forestry with a pro-active advisory service, educational opportunities for all those contemplating a forestry enterprise. It may also be necessary to provide certain essential services similar to the management, inventory sale packaging and marketing from a central source either through a co-op structure or through the expanded activity of the Forest Service.

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