

FOREST INDUSTRY STRATEGIC SUMMIT

Brought to you in association with STIHL

WOOD SUPPLY CHAIN COMPETITIVENESS -
REVIVING FORESTRY'S FINANCIAL PERFORMANCE



EVENT SPONSORS



www.woodsupplychain.com

FIVE STAR
 FUTURE FORESTS RESEARCH

ASSET
Forestry Logistics

EECA
Energy Efficiency and Conservation Authority
Te Tari Tikaki Pūngao

TTAN
VOLVO
TigerCat

UDC
New Zealand's Finance Company

POWER PARTS
Let power do the work

FOUR STAR
 Brightwater

Hydraulink
Hydraulic Pumps & fittings Centre
Best under pressure

THREE STAR
inwood
TIMBER INDUSTRY INTELLIGENCE

LOGGER

22 - 24 JULY 2008
ROTORUA

resin
FOREST ENGINEERING RESEARCH

www.resin.net.nz

Forest Industry Strategic Summit 2008

Wood Supply Chain Competitiveness - Reviving Forestry's Financial Performance

Day 1 - Tuesday 22 July 2008

Day 2 - Wednesday 23 July 2008

8.10 -8.20am	Introduction
8.20-9.00am	Key Note Address: Setting the Scene – NZ Economic Situation <i>Honourable Jim Anderton, Minister of Forestry</i>
Session 1: Forestry's Economic Position	
9.00-9.40am	Global Situation in the Forest Sector Economic progress through sustained R&D application - Sweden <i>Jan Fryk, Managing Director, Skogforsk</i>
9.40-10.20am	Global Situation in the Forest Sector Economic progress through sustained R&D application – North America <i>John Mann, FP Innovations FERIC</i>
10.20-10.50am	Morning Tea
10.50-11.20am	The NZ Forest Industry Situation: Where are We? <i>Peter Clark, CEO, PF Olsen Ltd.</i>
11.20-11.50am	The Australian Forest Industry Situation <i>Nick Roberts, CEO, Forestry NSW</i>
Session 2: Unwinding our Supply Chain: NZ Exposé Selected Case Studies	
11.50-12.20pm	Harvest Planning From bad to good: Plan, plan & plan <i>Don Robinson</i> Earthworks & Engineering NZ's Challenge: Re-engineer our fundamental approach <i>Don Robinson</i>
12.20-12.50pm	Harvesting: Felling From motor manual to mechanised & the mix <i>Keith Raymond</i>
12.50-1.50pm	Lunch
1.50-2.20pm	H&S Performance & Challenges Where are the pheromones for our industry? <i>Mike Fraser, MJ Fraser Logging</i>
2.20-2.50pm	Harvesting: Extraction Systems for the future <i>Rien Visser, Assistant Professor, Virginia Tech, USA</i>
2.50-3.20pm	Harvesting: Log Quality WQI perspective: When do we log radiata- what are the real issues? <i>Keith Mackie, CEO, WQI</i>
3.20-3.50pm	Afternoon Tea
3.50-4.20pm	Distribution The Road Ahead: Heavy Vehicle Productivity Improvements. <i>Brian Pritchard, Chair NZFOA Transportation Committee</i>
4.20-4.50pm	Investment & Efficiency Capital efficiency: Why 40% is not good enough? <i>Jon Dey, Director, FORME Consulting</i>
4.50-5.15pm	Summary

Conference Dinner/Charity Auction
see www.woodsupplychain.com for more details

8.10-8.20am	Day 1 Review & Introduction
Session 3: People: 'The War for Talent'	
8.20-9.00am	Current Situation - The Bleak Outlook unless We change the Sector Image. Skills, retention, training & productivity <i>Ian Boyd, CEO, FITEC</i>
9.00-9.40am	CRC for Forestry What is it out to achieve? <i>Professor Loren Kellogg, Australia</i>
9.40-10.20am	Who will Log the Future? <i>John Mann, FP Innovations FERIC</i>
10.20-10.50am	Morning Tea
10.50-11.20am	Technology Deployment: How do We Compare? <i>Michal Brink, South Africa</i>
11.20-11.50am	Current Profitability in the Supply Chain How do the owners & suppliers collaborate to innovate? <i>Mark Blackburne, Blackburne Group</i>
11.50-12.30pm	Management & Leadership Why leadership selection is critical to success <i>Paul Olsen, PJ & MJ Olsen</i>
12.30-1.30pm	Lunch
Session 4: R&D as a Country Strategy	
1.30-2.30pm	How & Why does it work and What are the Challenges? <i>Jan Fryk, Skogforsk, Scandinavia</i> <i>John Mann, FERIC Canada</i> <i>Professor Loren Kellogg, Australia</i>
2.30-3.30pm	Discussion Group Session
3.30-4.00pm	Afternoon Tea
4.00-4.30pm	Report Back on Discussion
4.30-4.50pm	NZ Strategy – Where are We Heading? <i>Russell Dale, CEO, Future Forests Research</i>
4.50-5.15pm	Conference Summary

Half-day Optional Field Visit Thursday 24 July 2008 KPP Kaingaroa Forest

8.30-10.00am	Interactive Field Sessions 1 & 2
10.00-10.30am	Morning Tea
10.30-12.00pm	Interactive Field Sessions 1 & 2
1.	What drives decision making on value recovery
2.	KPP Update – 15 years on, would we do it again?
3.	BuckMaker Integrated Supply Chain Needs: How to keep a customer satisfied and extract value from the forest.
4.	Manual Felling & Log Making Where to from here: Challenges in recovering the \$\$.

Forest Industry Strategic Summit 2008

Wood Supply Chain Competitiveness - Reviving Forestry's Financial Performance

Brought to you in association with STIHL



EVENT SPONSORS

FIVE STAR



Energy Efficiency and Conservation Authority
Te Tari Tiaki Pūngao

TITAN

VOLVO

Tigercat



FOUR STAR



Brightwater



Best under pressure

THREE STAR



Conference Information

Venue:

Rotorua Convention Centre 1170 Fenton Street Rotorua.

Accommodation:

The Novotel Lakeside Hotel is located on the shores of picturesque Lake Rotorua, placing you adjacent to Hotel Ibis, Rotorua's café strip and offering commanding views over the lake and surrounding hinterland. Only 5 minutes walk to the city centre. A special single room rate of \$155 (incl GST) has been negotiated with the hotel for conference delegates.

For room reservations please fill out the booking form on the conference website or book directly with the hotel by phone on 0800 77 66 77 or 07 346 3888, or by email to h1874-re01@accor.com

When booking mention you are attending this event to receive this special conference rate. Rooms are available on a first in-first served basis. Other accommodation is also readily available within a short distance from the venue and information can be found on www.rotoruanz.com

Who should attend?

Forest managers, forest owners, prime contractors, forestry consultants, plantation forestry researchers and key product and service suppliers to the forestry industry.

Please note:

Innovatek Ltd reserves the right to change the programme, if necessary, without prior notice to conference delegates.

Forest Industry Strategic Summit 2008

Wood Supply Chain Competitiveness - Reviving Forestry's Financial Performance

22-24 July 2008
Rotorua, New Zealand

The Repositioning of Applied Forest Engineering Research in Securing an Effective Wood Supply Chain.

New Zealand's wood supply chain is a billion dollar cost centre. Currently, it's estimated that as an industry, we are haemorrhaging by at least 15% per annum. This declining level of industry financial performance is not sustainable. New Zealand forestry's international competitiveness is seriously at risk. Ignoring this problem puts the industry at risk of stagnation and significant retrenching as a result.

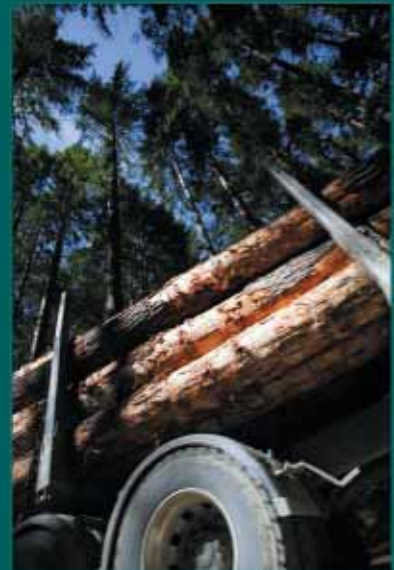
Speakers at this important Summit will profile the case to establish R&D investment in harvesting supply chain as a key input to economic growth and profitability. The Summit will strive to educate participants on current practises in the supply chain, promote opportunities and quantify performance gaps. Speakers will present examples of well executed outcomes in other leading forest products countries. They will demonstrate that a blend of applied and pure research is fundamental to sustained productivity growth.

This event will engage New Zealand's key forestry enterprises to strongly consider adopting an industry coalition for applied & pure research coupled to technology transfer as a basis for real productivity growth. It will require a strategy of investment in forest engineering capability across the supply chain.

A key part of this strategy will be to engage with other key global players to create an international collaborative process and knowledge sources including the CRC for Forestry in Australia; FERIC in Canada and SKOGFORSK in Sweden. The linkages to educational and training for New Zealand will also be vital to peer institutions, such as Oregon State University and the University of British Columbia, as targeted and well managed R&D investment linked to education & training is critical in sustaining real productivity growth and long term industry competitiveness.

After working closely with forest management companies and leading researchers we have developed a practical and strategic programme to address some key issues affecting the international competitiveness of the New Zealand forestry sector.

Resin Forest Research director Bruce Easton has brought together a range of strategic subjects and a group of international and local experts in these areas to address key issues. This Summit provides a key opportunity to move the industry forward with a common vision.



Event Managers



Forest Industry Strategic Summit 2008

Novotel Lakeside Hotel / Rotorua Convention Centre

Registrations Due by: Wednesday 16 July 2008

SPECIAL Early Bird Discount: Register by Friday 13 June 2008

REGISTRATION FORM

Delegate Details:

Delegate Details:

Full Name	Position	Email
Company:		
Postal Address:		
Tel:	Fax:	

Please copy for additional registrations if necessary

I wish to register for the following: (please tick)

Registration Rates:

	Early Bird	Standard
Per Delegate Rate*	<input type="checkbox"/> \$840	<input type="checkbox"/> \$960
Per Delegate One Day Registration (Please specify day) _ _ _ _ _	<input type="checkbox"/> \$640	<input type="checkbox"/> \$720
Conference Dinner	<input type="checkbox"/> \$64	<input type="checkbox"/> \$64
Partners Conference Dinner	<input type="checkbox"/> \$54	<input type="checkbox"/> \$54
Half-day Field Visit (Optional)	<input type="checkbox"/> \$64	<input type="checkbox"/> \$64
SUB TOTAL	\$	\$
+GST (12.5%)	\$	\$
Total Amount Enclosed	\$	\$

* Registrations must be received on or before Friday 13 June to be eligible for the Early Bird Discount.

The REGISTRATION cost covers morning and afternoon teas, lunches and refreshments and copies of the detailed conference proceedings.

CANCELLATIONS: Cancellations of any conference registrations must be made in writing to Innovatek Ltd to qualify for a refund. Cancellations received before FRIDAY 20th JUNE 2008 will qualify for a 50% refund of fees paid. Cancellations after 20th JUNE will not qualify for a refund. However, other persons within the same company can attend in the place of the registered delegate.

Method of Payment:

- Direct credit our Westpac Account: 031552-0257749-00
- Cheque payable to Innovatek Ltd enclosed, or
- Please debit my MasterCard/Visa/Amex/Diners (circle one)

Amount Enclosed: \$ _ _ _ _ _
 Credit Card Number: _ _ _ _ _
 Expiry Date: _ _ _ _ _
 Cardholder's Name: _ _ _ _ _
 Cardholder's Signature: _ _ _ _ _

PLEASE RETURN TO:

Innovatek Ltd
 PO Box 6160
 Rotorua 3043, New Zealand
 Fax: (+64) 7 921 1381
 Email: libby.stulen@innovatek.co.nz

For more information contact us on ph: (+64) 7 921 1382
 OR register electronically on www.woodschain.com

If you are interested in sponsorship or display opportunities at this event contact:

Gordon Thomson
 Ph: (+64) 7 921 1380, Fax: (+64) 7 921 1381
 Email: gordon.thomson@innovatek.co.nz

Forest Industry Strategic Summit 2008

Wood Supply Chain Competitiveness - Reviving Forestry's Financial Performance



**Jan Fryk – Skogforsk
SWEDEN**

"Staying Alive" –Worldwide demands on forests are increasing. Industry needs more wood fibre, but forests also mitigate climate change effects. Competition for forest biomass as an energy source will increase. Growing environmental awareness is far-reaching and driving towards more conservation. To stay alive, internationally the forest industries must be profitable. Productivity in Swedish forestry must increase by 2-4% annually to maintain competitiveness and sustained R&D.



**Nick Roberts – Forests NSW
AUSTRALIA**

"Nick Roberts will highlight the changes which have brought both the Australian and New Zealand forest industries to where they are today. He will provide a snapshot on the current issues facing the Australian forest industries in particular and what challenges they face at both strategic and operational levels."



**John W. Mann – FPInnovations
CANADA**

"Declining forest products profitability in Canada has important parallels with the New Zealand industry. Technological changes are rapidly causing a transformation. USA currency changes have added unprecedented stress in both countries. The Canadian response was to merge four national research institutes into a new business entity – FPInnovations. The forces leading to the merger, the research strategy developed, and their ongoing tactics will be the topic of John Mann's presentation."

Field Trip – Log Manufacturing – at Kaingaroa Processing Plant

Forest management company Timberlands operates the Kaingaroa Processing Plant (KPP) which processes 1.2 million tonnes of stem length Radiata Pine each year into a wide range of high value forest products. KPP is unique in New Zealand and ensures value optimisation is achieved in a controlled environment. The field trip visit will focus on Timberland's experiences in running and upgrading KPP for the benefit of field trip delegates.



**Ian Boyd
FITEC**

"Ian will be outlining the current labour and skills situation and future needs of the industry. He will cover the issues around addressing this critical problem for the industry, including competitive pressures from other industries. Actions required, and underway, will also be discussed."



**Jon Dey
Forme Consulting**

"Jon Dey will present an overview of capital utilisation comparing forest industry operations in New Zealand with leading countries in the market."



**Russell Dale
Future Forests Research**

"Russell's presentation will highlight the challenges facing forestry operations throughout New Zealand and the role which Future Forests Research will be taking to assist the industry to successfully deal with these challenges and opportunities they present to the industry."