



**Timber Trade
Industrial Association**

POLICY PAPER

Addressing significant and unsustainable building industry distress caused by the overwhelming success of the Home Builders Grant.

March 2021



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1. Industry call for urgent action

FTMA, MGA TMA, TABMA and TTIA collectively represent thousands of fabricators, employers, tradespeople, wholesalers and employees in the timber fabrication, wholesale, retail and construction supply chains.

Our organisations would like to congratulate the Commonwealth, State and Territory Governments for the active stimulus responses thus far that have been taken to ensure that Australia's post-COVID-19 economic recovery leads the world and to place Australian businesses in a prime position to benefit from that recovery.

These stimulus actions were developed and implemented rapidly, which has resulted in unintended consequences, which require urgent action to ensure that the intended outcomes of the policy solutions are delivered fully and most effectively. Our organisations have identified four key areas for consideration by the Commonwealth, State Governments and National Cabinet.

What is needed?

We have developed a suite of recommendations which we believe, if implemented, will considerably ease the immediate and foreseeable challenges that are currently being experienced. These include:

1 Reduce undue financial and commercial pressure on home owners and construction businesses

We are asking the Commonwealth Government to take urgent steps to:

- 1.1 Immediately extend the required commencement date of construction for dwellings to 18 months to ensure that the full effect of the policy is achieved without placing undue financial and commercial pressure on home-owners and construction businesses.
- 1.2 Reconsider extending the HomeBuilder grants scheme until June 2022 in order to minimise the potential for a dramatic reduction in housing construction activity.

2 Get people back into the workplace

We are asking the Commonwealth Government and National Cabinet to:

- 2.1 Examine opportunities to adjust the JobSeeker and JobKeeper programs to focus on mechanisms to encourage skilled workers back into the workforce.
- 2.2 Continue to work with industry to develop sustainable and workable solutions to the overwhelming shortage of skilled labour and trades.

3 Reduce further disruptions to the broader economy

We are asking the Commonwealth and State Governments and National Cabinet to:

- 3.1 Recognise and confirm the role of timber processors, manufacturers and merchants as essential industries in order to prevent lockdown impacts on national inventories of structural grade timber.
- 3.2 Increase efforts to recognise and reward the role of timber in construction in storing carbon and contributing to improved climate change outcomes.
- 3.3 Identify and capitalise on solutions for longer term domestic timber security, working within existing policy frameworks to expand the footprint of commercial plantations.

2. The need for policy alignment

2.1 HomeBuilder an effective stimulus intervention

The Commonwealth Government's HomeBuilder grants scheme has been a highly effective policy intervention. It is achieving tangible outcomes to stimulate Australia's housing construction sector, and the economy more broadly, in the wake of the COVID-19 induced economic setbacks of the past 12 months.

However, there are potentially serious unintended consequences emerging – a situation which is not unexpected given how quickly the policy has been developed and implemented. This situation has arisen due to an unusual confluence of circumstances affecting the housing construction supply chain.

By recognising and addressing these circumstances, Commonwealth and State Government policy makers have the opportunity to work with industry and nip these emerging issues in the bud. Committed and timely action will ensure the HomeBuilder grants scheme continues to contribute to Australia's economic recovery, while also dealing with potentially adverse, unintended outcomes.

2.2 A perfect storm

A group of Australian timber construction sector advocacy bodies has identified that Australia's building sector is currently experiencing a perfect storm. This has resulted from a multitude of factors which are making it increasingly difficult to service the building supply chain as the Australian economy responds to the COVID-19 impacts and the building sector seeks to meet surging demand.

FTMA, MGA TMA, TABMA and TTIA collectively represent thousands of fabricators, employers, tradespeople, wholesalers and employees in the timber fabrication, wholesale, retail and construction supply chains. These four organisations share a concern that the current situation is potentially perilous for each of the sectors.

There is growing concern that these issues will result in unresolvable supply chain challenges. Members of our organisations are already reporting on the immediate problems with accessing structural grade timber, an issue which has also received considerable media attention.

Added to this are challenges with accessing skilled labour and trades-people as well as global supply chain constraints and enhanced commodity and raw materials demand driven by a combination of COVID-19 restrictions and increasing focus on domestic manufacturing in many of the world's economies.

Beyond the current HomeBuilder policy timeframe, analysts predict that the current surge in dwelling approvals and sales will plummet. This is because migration is expected to run at very low levels for some years to come and the rate of new household formation has declined dramatically as a consequence of pandemic-induced job losses. Evidence for this decline is already apparent in the new dwelling approvals and sales data for January, immediately following the first round of grants. While the numbers are rising ahead of the end of the second round of grants which finishes on 31 March 2021, they are expected to decline again in April.

2.3 Immediate challenges

The most significant immediate concern is that the success of the HomeBuilder grants scheme has created a situation of unprecedented demand for both building materials and skilled labour. This has resulted in a situation where suppliers are struggling to meet demand and prices for both construction materials and labour have increased. As a consequence, there are real concerns about the ability of the sectors to meet construction commitments.

Given the time limits between approval for grant funds and commencement of construction, there is a concern that many new builds, which were committed on the basis that the HomeBuilder grant funds were factored into the construction price, will not commence on time. This has potentially serious implications for both consumers, exposed to increased and potentially unsustainable debt, and builders exposed financially to forward commitments which may not go ahead.

There is also some concern within the sector that the current levels of construction activity can't be sustained and that the reduction in activity once the HomeBuilder grant scheme is concluded could cause widespread contraction in the housing construction industry.

2.4 Medium to long term challenges

This third section of this paper outlines in detail the short, medium and long term challenges facing our members. In summary, these include:

Longer term timber availability is an issue

Reduction in plantation area through land use change, damage by fire and plantation age profile are all contributing to a medium term reduction in the availability of plantation grown timber in Australia. Availability is further compromised by current high demand.

Supply chain constraints are impacting the sectors

COVID-19 induced supply chain challenges and a global focus on domestic manufacturing have combined to:

- reduce the availability of timber imports
- increase prices throughout the supply chain
- constrain the free movement of goods both domestically and internationally.

Skills availability affects the entire supply chain

Australia is facing a skilled labour and trades shortage which has been exacerbated by the JobSeeker and JobKeeper programs. A healthy, vibrant construction sector depends on the availability of skilled labour and trades.

We note the success of the Commonwealth Government's Boosting Apprenticeship Commencements Program which has provided funding for 100,000 trainees and apprentices although it is important to recognise that, while the program has been extended, recent participation has been impacted by a lack of applicants across all industries due, in part, to the impact of JobSeeker and JobKeeper.

Migration and population growth are problematic

New household formation has declined and migration is stagnant, both as a direct consequence of the COVID-19 pandemic. Australia's economic growth is strongly linked to population growth which is supported by young adults leaving home to make new households and by the maintenance of migration levels into Australia.

2.5 Emerging opportunities

Timber is the Ultimate Renewable. Using timber in the construction of buildings and dwellings contributes significantly to long term sequestration of carbon. Growing trees sequester carbon. Timber from those trees applied in long term uses, such as housing construction, ensure that carbon stays locked up. Timber framed buildings have an estimated 60 per cent lower embedded energy than an equivalent brick veneer home. Australia's timber supply chains, from paddock to house, provide the most effective mechanism for taking active steps to reduce atmospheric carbon and address climate change.

3. The issues in detail

3.1 HomeBuilder

A successful policy intervention

It is estimated that HomeBuilder grant applications will have exceeded 100,000 by the end of the third quarter of FY2021¹. The highly successful stimulus measure is set to exceed \$2 billion, with more than 88,000 applications at the end of February 2021.

Initial Commonwealth Government forecasting indicated the stimulus program would be accessed by some 27,000 households with a budget estimate of about \$680 million.

By any measure, this standalone stimulus package has contributed significantly to Australia's post-COVID economic recovery. However, like any significant economic stimulus, there have been unforeseen impacts. These impacts are currently playing out in the housing construction sector with implications for the entire supply chain and, indeed, for the medium term viability of both the stimulus package itself, as well as individuals and businesses which are currently relying on it.

The challenges are complex and interlinked. At its most simple, shortages in critical construction materials, including but not limited to timber, combined with import delays and shortages in the availability of skilled trades and labour, mean that the ability for builders to deliver construction within the window allowed by the stimulus payment is significantly compromised.

How does it work?

The HomeBuilder grants scheme was introduced by the Commonwealth Government in June 2020 as a mechanism to support the building industry, which was significantly impacted by the reduction in economic activity as a result of COVID-19 restrictions². The scheme was also intended to drive broader economic activity as part of a raft of stimulus measures introduced at the time.

Initially the HomeBuilder scheme was intended to run until 31 December 2020, with eligible applicants receiving \$25,000 towards the construction of a new home, worth up to \$750,000, or a substantial renovation on homes worth up to \$1.5 million, based on contracts signed between 04 June 2020 and 31 December 2020.

In November 2020, following the success of the initial grant, the Government extended the grant (at a lower level of \$15,000) for building contracts signed between 01 January 2021 and 31 March 2021.³ An eligible application also requires that the construction commence within six months of the contract execution.⁴

While the HomeBuilder grants scheme is a Commonwealth Government initiative, it is administered by the states and territories through each jurisdictions' revenue office.

What the numbers say

The rapid and effective impact of the HomeBuilder stimulus is readily identifiable from the most recent data provided by the Australian Bureau of Statistics in relation to total new dwelling approvals. In May 2020, total new dwelling approvals were at 12,756 (refer Figure 1). This reflected the largest dip in private dwelling approvals since early to mid-2012. The impact of the HomeBuilder grants scheme was immediate and significant, with new approvals lifting to 19,479 in December, within range of the apartment approvals boom of the mid-2010s, before dropping back rapidly in December with the reduction in the grant from \$25,000 to \$15,000, and at the end of the original grant period.

¹ <https://www.realestate.com.au/news/homebuilder-australia-faces-2bn-plus-bill-as-applications-tipped-to-top-100k/#:~:text=Melbourne-,HomeBuilder%3A%20Australia%20faces%20%242bn%20plus%20bill%20as,applications%20tipped%20to%20top%20100k&text=The%20federal%20government%20is%20facing,it%20would%20cost%20%24680m.>

² <https://www.canstar.com.au/home-loans/homebuilder-scheme-explained/>

³ <https://treasury.gov.au/coronavirus/homebuilder>

⁴ [https://www.sro.vic.gov.au/homebuilder-grant-guidelines#:~:text=HomeBuilder%20provides%20eligible%20owner%20Doccupiers,%20Dplan%20home%20Fnew%20home.&text=A%20%2425%20C000%20grant%20is%20available,31%20December%202020%20\(inclusive\).](https://www.sro.vic.gov.au/homebuilder-grant-guidelines#:~:text=HomeBuilder%20provides%20eligible%20owner%20Doccupiers,%20Dplan%20home%20Fnew%20home.&text=A%20%2425%20C000%20grant%20is%20available,31%20December%202020%20(inclusive).)

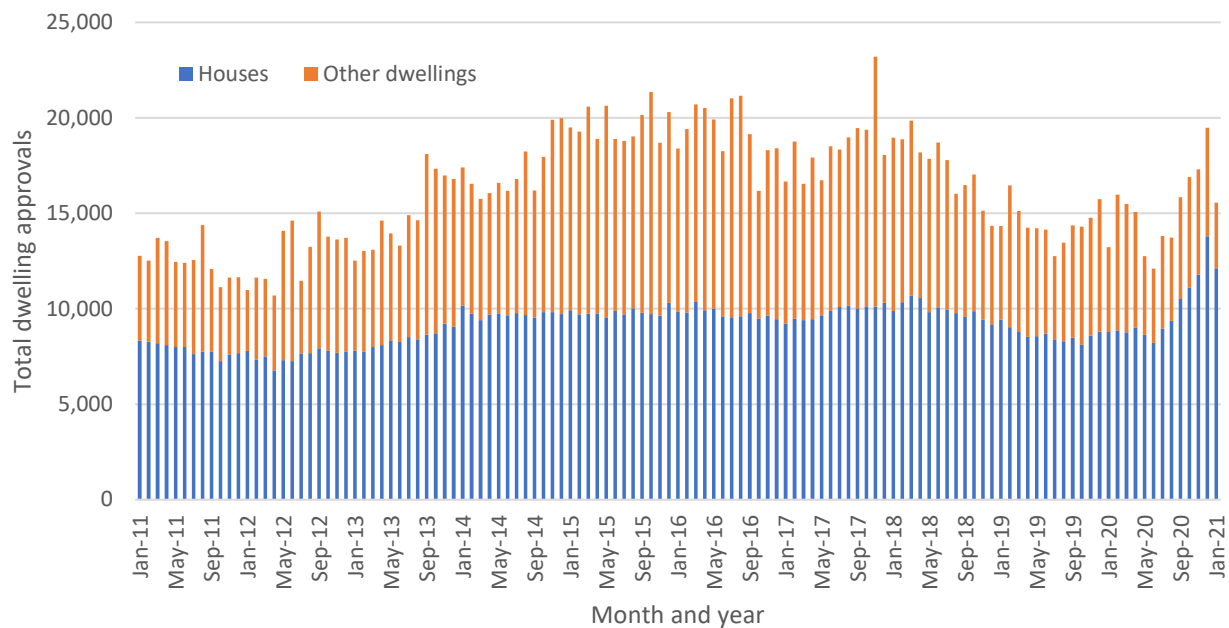


Figure 1: Total private dwelling approvals, seasonally adjusted⁵

The story for houses, which were the target of the scheme, is even more telling. Figure 2 shows the rapid increase from May 2020 to record approvals for stand-alone houses at 13,802 in December.

It is important to note that the drop in approvals in January is much less significant, and in fact approvals for that month are the second highest in seasonally adjusted figures, at 12,124.

It is also important to note that stand-alone house approvals were already subdued prior to the COVID-19 pandemic and associated economic impacts.

Some industry analysts point to the fact that the HomeBuilder Scheme has tapped a latent demand, particularly among first-home buyers for whom the market was beyond reach prior to the grant's implementation.⁶ The proportion of new home loans being taken up by first-home buyers has risen from 15 to 25 per cent. However, there is an added concern that new home formation is declining, with younger adults returning home following pandemic induced job losses, and inward migration having practically halted in at least the near term (albeit partially substituted by returning citizens for a short period of time).

Acknowledging that dwelling approvals is a lag indicator, nevertheless, privately held new house sales data provided directly by builders demonstrates a similar pattern. In work undertaken for FTMA, IndustryEdge presented Housing Industry Association (HIA) data which shows a dramatic increase in new private house sales from June 2020, following the announcement of the HomeBuilder grants scheme, peaking in December 2020 prior to the reduction in the grant applicable from January 2021 to March 2021 (refer Figure 3).⁷

⁵ Source: Australian Bureau of Statistics (<https://www.abs.gov.au/statistics/industry/building-and-construction/building-approvals-australia/latest-release> - Accessed 08 March 2021)

⁶ <https://www.afr.com/property/commercial/homebuilder-booms-as-household-formation-busts-20210217-p5739l#:~:text=HomeBuilder%20has%20unlocked%20%E2%80%9Chidden%20vacancy,Stockland%20boss%20Mark%20Steinert%20said.>

⁷ Briefing #7: Housing 'bubbles', the pipeline of work and supply chains. Prepared by IndustryEdge for FTMA, February 2021.

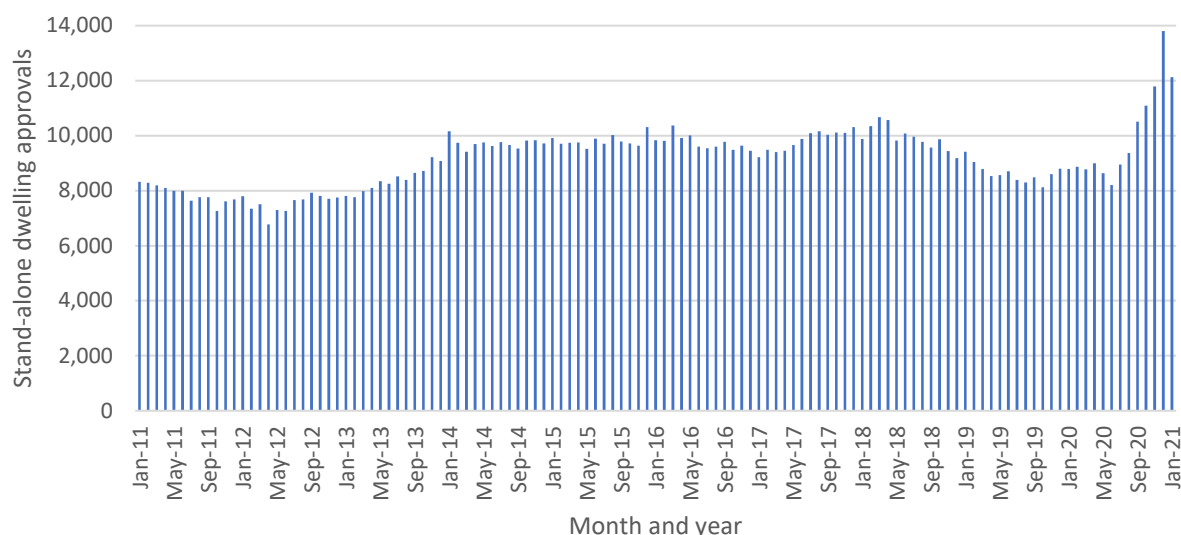


Figure 2: Private house approvals, seasonally adjusted⁸

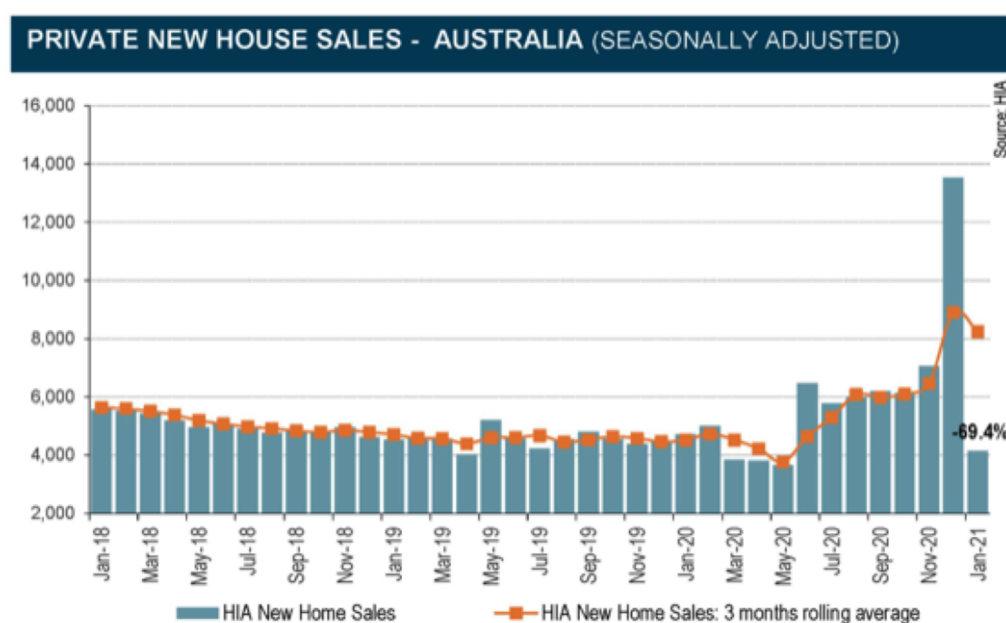


Figure 3: Private new house sales

3.2 Whole of industry issues

Skills shortage

The availability of skilled labour and trades is an issue throughout the economy. It is particularly acute in the construction sector. The Housing Industry Association has published data which demonstrates that skilled trade vacancies generally have risen dramatically since early 2020 but skilled construction vacancies have been a particular concern (refer figure 4).

⁸ Source: Australian Bureau of Statistics (<https://www.abs.gov.au/statistics/industry/building-and-construction/building-approvals-australia/latest-release> - Accessed 08 March 2021)

Skilled Trade Vacancies - Australia

Source: Department of Employment

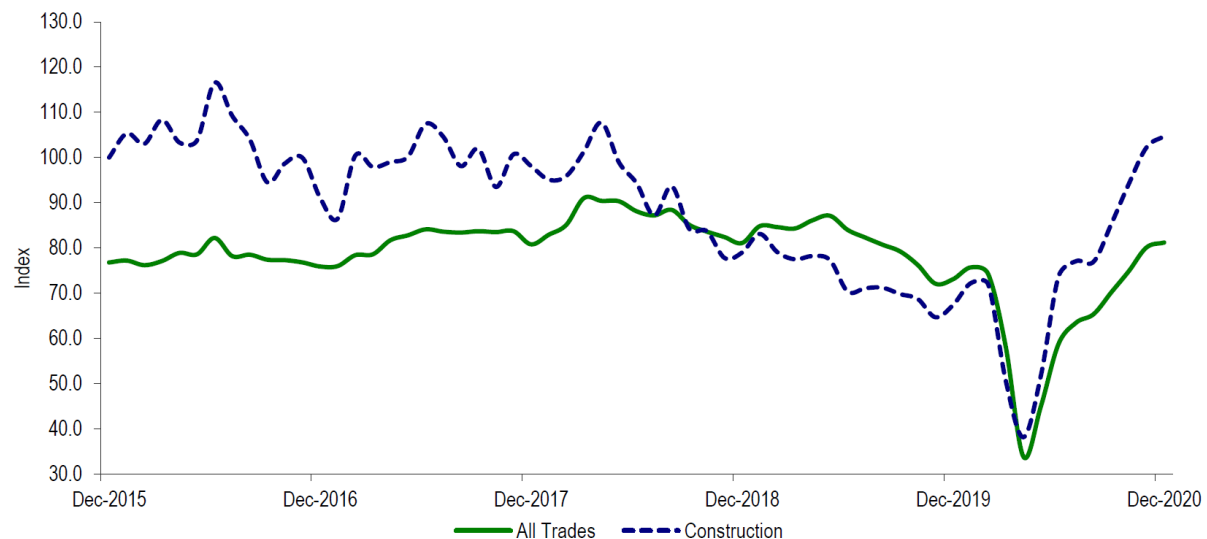


Figure 4: Skilled trade vacancies Australia⁹

Our members are concerned that a significant contributing factor is the extension of the JobKeeper and JobSeeker programs which appear to be a positive disincentive to return to work. Like many other industrial sectors in the Australian economy, we believe that, while these programs have been a critical part of the economic and policy response to the COVID-19 pandemic, there is now a need for a more nuanced policy setting which is focused on encouraging employees back to the workforce.

Essential industries

The South Australian lockdown in 2020 required the closure of sawmills in the Green Triangle for three days. This singular event had the effect of compounding pre-existing issues in relation to softwood sawn timber inventories and the repercussions are still being felt in the first quarter of 2021.

This points to the necessity of ensuring that the timber harvesting, haulage, processing and manufacturing sectors are considered essential industries in the event of future lockdowns.

3.3 Carbon storage in timber

The environmental benefits of timber construction are significant in comparison to alternative materials. It is estimated that a timber framed house has 60 per cent less embedded energy than a brick veneer equivalent. While products such as steel, concrete and bricks require inordinate amounts of energy in their production, timber stores carbon from the point that a tree is planted in the ground until it is put in use.

If a standard timber framed house incorporates 3m³ of timber in its construction. That's about 3 tonnes of carbon dioxide equivalent and about 0.83 tonnes of pure carbon. No other construction material can make the claim that it stores more carbon than is used in its production.

The Commonwealth Government's **National Forest Industries Plan: Growing a Better Australia – A Billion Trees for Jobs and Growth**¹⁰ actively supports the role of expanding Australia's planted forest estate by ensuring that the right trees are planted at the right scale in the right places, improving the ability for plantations to contribute to Australia's carbon sequestration targets by facilitating the participation in Australia's Emissions Reduction Fund.

⁹ HIA Australian Outlook: Summer Edition 2021

¹⁰ <https://www.agriculture.gov.au/forestry/national-forest-industries-plan>

3.4 Timber availability

The media has reported widely on a shortage of timber in Australia available to support construction and renovations. There are a number of factors which potentially contribute to the availability of timber. These include timber trade between economies, domestic timber production (both long and short term) and demand. As recently as March 2021, NSW Deputy Premier, The Hon. John Barilaro told a NSW Budget Estimates hearing that the state is facing a “cliff edge moment” where timber supply will run out.¹¹

Timber trade

Figure 4 presents a summary of available data related to the import and export of softwood sawn timber and logs and the production of softwood logs from Australian plantations. We have chosen softwood because of its predominance in sawn wood applications in Australian markets.

The graph provides for some interesting observations in relation to timber trade.

1. Rough sawn softwood timber exports and imports have been more or less evenly balanced since the mid-2000s. It is likely that the quality of rough sawn timber imported is better than the rough sawn timber exported, which is possibly not suitable to use in housing construction, for example, but may be used in products such as pallets.
2. Dressed softwood timber imports are considerable and have increased as a proportion of sawn wood imports over the past 20 years. Exports of dressed softwood timber are minimal and have been non-existent in recent years.
3. There was a very large (44 per cent) decrease in import volume of timber in 2019/20, representing the lowest volume of softwood sawn wood imports since 2006/07. This was most likely due to COVID induced trade logistics issues combined with increased demand for timber in other economies.
4. Round log exports dwarf the entire sawn wood trade and have increased rapidly since the late 2000s. That increase has been driven largely by significant demand from China for round log imports, along with a long term trend of suppressed softwood woodchip prices in export markets.
5. However, round log exports have practically ceased due to China’s ban on imported timber from Australia
6. Domestic log production and round log exports have both decreased by about eight per cent from recent highs. However, this is on the back of sustained growth for both over the past decade.
7. In the case of total domestic softwood log production, this probably reflects a combination of age class distribution in plantations, and the impact of fires over the past decade (noting that this data does not yet account for the impacts of the 2019/20 fires season on plantations in New South Wales and Victoria).
8. In the case of round log exports, the reduction reflects a combination of the reduced harvest levels overall as well as the drop in price for the China market at the end of 2019, followed by trade logistics challenges as a consequence of COVID-19 and then trade tension and import bans imposed by China during 2020.

These timber trade observations must be considered in the context of generic and global trade challenges which have further resulted in significant demand increase for commodity products and raw materials, substantial increases in freight and logistics costs as well as raw material costs and freight and logistics constraints which have limited the movement of goods. This is an issue for timber, along with a range of other building materials.

Timber production

The ABARES data is not up to date for domestic log consumption and production for 2019/20.

As noted above and evident in figure 5, domestic softwood log production has declined by some eight per cent over the past three years. However, this is on the back of an overall sustained increase in domestic softwood log production over the past fifteen years.

¹¹ Timber & Forestry E-News; Issue 647: March 4, 2021



Figure 5: Softwood timber imports and exports and domestic log production¹²

ABARES¹³ has modelled relatively consistent softwood plantation log supply over the next 30 years, ranging between 16 million m³ per annum and 18 million m³ per annum (refer figure 6). However, it should be noted that this analysis was undertaken in 2016 and does not account for the significant impact of the 2019/20 fire season on near term softwood log production.

Notwithstanding the longer term trends in domestic log production, there have been short term impacts which have had a material effect on the availability of structural timber and have aligned with the timing of the HomeBuilder stimulus.

Sawmills throughout Australia have identified difficulties with meeting increased demand for structural timber, including plant shut downs due to COVID-19 lock down requirements (South Australia) as well as the emerging impact of the 2019/20 fires (New South Wales and Victoria), which have impacted their ability to build inventory to meet the enhanced demand.

¹² Source: ABARES, afwps_tabular_datasets_2020_v1.0.

¹³ ABARES 2016, Australia's plantation log supply 2015–2059, Australian Bureau of Agricultural and Resource Economics and Sciences, Canberra, December

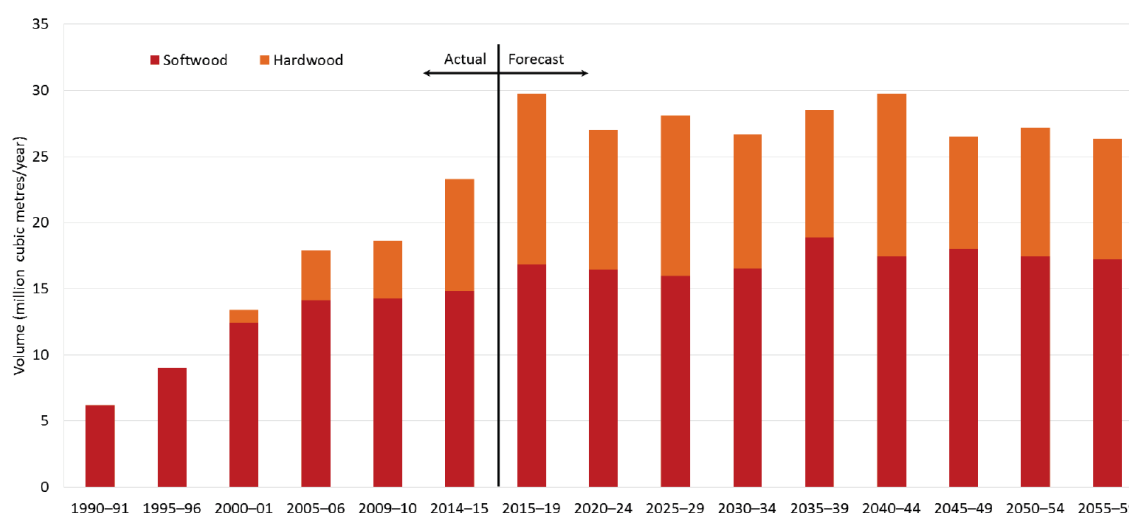


Figure 6: Actual and forecast annual average plantation log availability¹⁴

Supply/demand balance

There is evidently an immediate imbalance between demand and supply, driven in large part by the dramatic (and unpredictable) increase in dwelling approvals and sales which has, in turn, led to considerable pressure on available sawn timber supplies. There are no easy solutions to this problem but there are steps which could be taken to minimise its impact.

Key considerations are:

1. Opportunities to improve supply chain bottlenecks, specifically in relation to imported timber products. There is also the issue of significant demand in other jurisdictions, particularly the USA where the market is currently booming.
2. Opportunities to support movement of structural grade logs between regions, particularly where those logs are being used in lower grade applications.
3. The cessation of round log exports means that there are potentially logs without a market currently.
4. Engagement with commodity pulpwood producers and round log exporters in relation to the challenge identified in point 2, to determine if there are softwood logs currently being processed for pulp and paper products which are of sufficient quality that they could be diverted to solid wood processing and markets.
5. However, it is important to note that the quality of logs traditionally destined for pulpwood or round log export markets is low and the likelihood of economic recovery of material volumes structural grade timber is also likely to be low.
6. It is also important to note that there are existing contractual supply arrangements in place for large pulpwood and paper/board manufacturers in the Gippsland and Murray River regions.

Longer term supply

There has been a prevailing view that there is still a considerable area of planted forest in Australia which will be converted to other land uses. While this may or may not be the case, it is most likely that it would apply to hardwood plantations for pulpwood production, rather than softwood plantations for solid wood production. Nevertheless, softwood plantations in key regions of Australia have been heavily impacted by significant fire events in recent years. Specifically, the 2019/20 fires which impacted large areas of the New South Wales and Victorian plantation estates will have a material impact on long term softwood structural timber supply.

¹⁴ ABARES 2016, Australia's plantation log supply 2015–2059, Australian Bureau of Agricultural and Resource Economics and Sciences, Canberra, December

Summary

In summary FTMA, MGA TMA, TABMA and TTIA would like to reiterate our support and congratulations for the ongoing commitment to economic stimulus and business recovery being undertaken by Australian governments at Commonwealth and State level.

We encourage all Australian Governments to continue to engage with industry and to seriously consider the recommendations we have developed, which are intended to ensure the effective delivery of the intended outcomes of existing measures.

Those recommendations are:

1 Reduce undue financial and commercial pressure on home owners and construction businesses

We are asking the Commonwealth Government to take urgent steps to:

- 1.1 Immediately extend the required commencement date of construction for dwellings to 18 months to ensure that the full effect of the policy is achieved without placing undue financial and commercial pressure on home-owners and construction businesses.
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- 3.3 Identify and capitalise on solutions for longer term domestic timber security, working within existing policy frameworks to expand the footprint of commercial plantations.

This discussion paper has been prepared as a collaboration by a core group of Australia's leading timber construction industry representative and advocacy groups.



Kersten Gentle
Executive Officer
FTMA Aust.



Jos de Bruin
Chief Executive Officer
MGA TMA



David Little
Chief Executive Officer
TABMA



Brian Beecroft
Chief Executive Officer
TTIA

Who we are



Frame & Truss Manufacturers Association of Australia (FTMA)

The Frame & Truss Manufacturers Association of Australia Ltd (FTMA Australia) is an independent, national organisation representing fabricators of and suppliers to the timber prefabricated timber truss and wall frame industry in all Australian States and Territories.

The major aims of the FTMA Australia are to provide a unified voice, to protect and advance our two billion dollar industry and to be involved in the setting of standards and guidelines that serve as benchmarks for all those who deal with our industry.

Contact: Kersten Gentle, *Executive Officer*

M: 0418 226 242

E: kersten@ftma.com.au



MGA TMA (Timber Merchants Australia)

MGA TMA - Timber Merchants Australia, is a national registered employer's organisation comprising timber merchants, hardwood sawmills, wholesalers, fabricators and hardware businesses.

Representing over 250 family and private business members, generating in excess of \$2 billion in revenue annually, employing approximately 6,000 employees.

Contact: Jos de Bruin, *CEO*

M: 0418 312 723

E: jos.debruin@mga.asn.au



Timber & Building Materials Association (Aust) Ltd. (TABMA)

TABMA is a National Industry Association representing around 300 Members engaged in the Manufacture, Import, Wholesale and Retail of Timber and Building Materials. Recently celebrating our 80th birthday, TABMA supports the Industry through the development of the Industry Labour force, by driving Workplace health and safety, by advocating on behalf of members and the provision of many other services designed to promote the interest of our members and the industry at large.

Contact: David Little, *CEO*

M: 0447 813 786

E: david.l@tabma.com.au



Timber Trade Industrial Association

The Timber Trade Industrial Association (TTIA) assists small businesses with a comprehensive range of services. TTIA's services provide practical help for people starting up their own business and for those looking to expand established operations in the forest and forest products industry. TTIA is a completely independent, non-profit, federally registered employer organisation, with an emphasis on giving prudent and commercially realistic advice. TTIA is a national association that represents the entire supply chain including sawmilling, harvesting, manufacturing and merchandising. As 30% of our members are businesses with up to five employees, and another 22% have up to ten employees, we have a great deal of experience in handling small business issues specifically relating to industrial/employment relations, OH&S and workers' compensation matters.

Contact: Brian Beecroft, *CEO*

M: 0419 012 522

E: brianbeecroft@ttia.asn.au