



MURRAY REGION FORESTRY HUB STRATEGIC ACTION PLAN JANUARY 2024



Murray Region
Forestry Hub



GREENWOOD
STRATEGY

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INTRODUCTION



BACKGROUND

About the Hub

The Murray Region Forestry Hub (the Hub) was established in 2019. It is one of eleven similar organisations located in key forest industry regions around Australia. The Hub's focus is to work with key stakeholders to undertake strategic planning, technical assessments and analysis which will support improved productivity, investment and expansion, as well as inform the Australian Government's future investment and strategic policy decisions for the forest and wood products sector in the region. This report was commissioned by the Hub with funding from the Australian Department of Agriculture, Fisheries and Forestry.

Priority focus areas

At its commencement the Hub identified four strategic pillars underpinning its priorities for focus:

1. **Community Engagement:** Focused on enhancing community engagement with the forest-based industry, emphasising its significance for job creation and wealth while highlighting the softwood plantations sector's carbon sequestration capabilities through a series of actions, including fact sheets, public workshops, communication strategies, events, and forest tours.
2. **People/Skills:** Focused on ensuring the forest industry has a well-trained and accredited workforce that meets national standards while making the industry an attractive workplace by identifying and addressing current and future skill demands, collaborating with training providers, promoting career pathways, and engaging with other skill and training organisations.
3. **Adequate Infrastructure:** Focused on ensuring that the industry remains globally competitive by improving infrastructure, particularly in areas such as roads and energy efficiency, while identifying supply chain productivity enhancements.
4. **Resource Security:** Focused on restoring and expanding the regional plantation estate to 2019 levels while restructuring the industry for long-term sustainability and recognising its positive impact on climate change and socio-economic aspects, with actions encompassing fire recovery, replanting, forecasting, expansion, and promotion of carbon sequestration.

Strategic review

This report presents a summary of the results of a strategic review and action planning process which is intended to provide the basis for the Hub's work focus over the next two to three years.

REGIONAL INDUSTRY OVERVIEW

Key forestry region

The Hub region covers a large area of southern NSW and north-east Victoria, as shown in Figure 1. The total plantation area of approximately 168,000 ha comprised predominantly of radiata pine (*Pinus radiata*) and servicing one of Australia's most significant concentrations of softwood fibre processing capability.

Significant processing capacity

There are eight significant processing facilities located at key regional centres, including Tumut, Tumbarumba, Myrtleford, Benalla, Wodonga and Wangaratta. These facilities process more than 90% of the region's plantation fibre to manufacture products including packaging, sawn timber, plywood, medium density fibre-board, particle board and cross laminated timber.

Impact of fires

The 2019/20 Black Summer fires resulted in about 47,000 ha of plantation in NSW and 6,000 ha in NE Victoria being badly burnt. This meant that around 40% of the log resource on which timber processing activity is based has been lost in the short to medium term. Following an extensive salvage and replanting program, log production levels are not expected to recover until the mid-2030s.

Economic importance

Despite the impact of the fires, the industry is economically significant to the region. Prior to the fires it directly supported 7,000 jobs. Gross value of output was estimated at \$2.5 billion annually and value-added contribution to the region at \$1.2 billion.

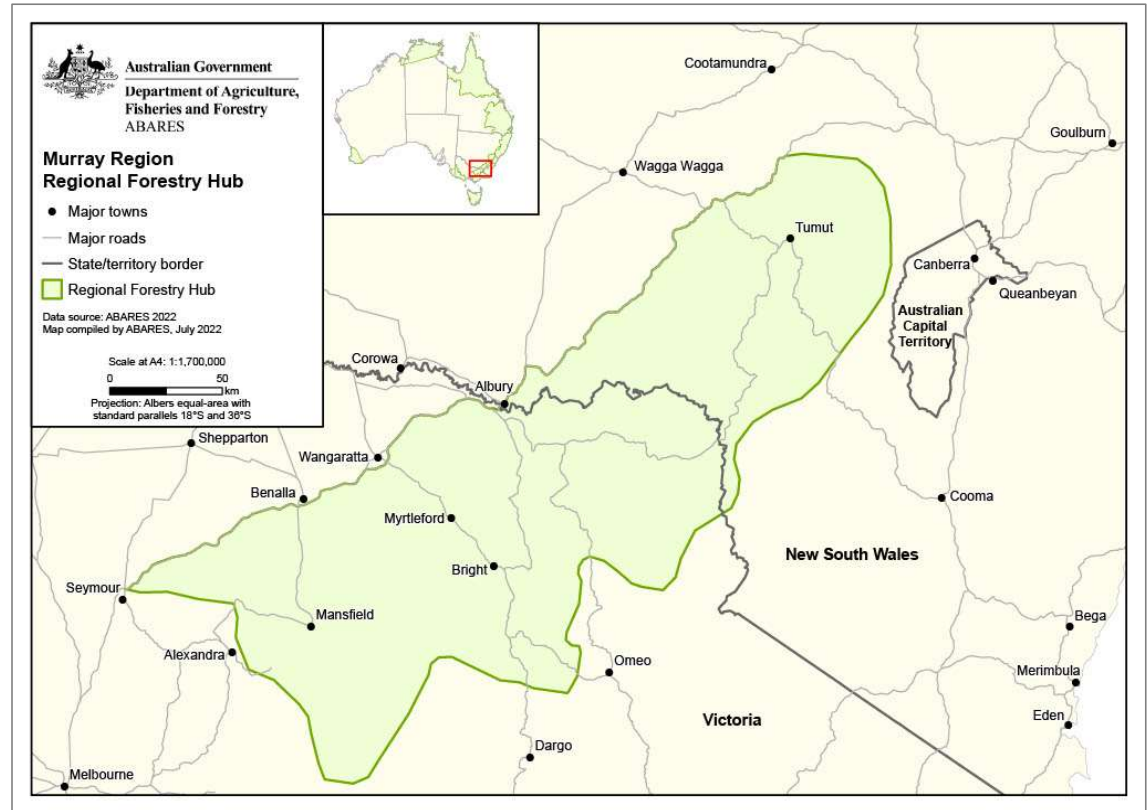


Figure 1: Murray Region Forestry Hub boundary

PROJECT OVERVIEW



PURPOSE AND OUTCOMES

Rationale

Following a period of post-fire salvage and plantation re-establishment and general consolidation for the industry, the Hub has identified the need to revisit its strategy and action plan. The revised plan is intended to provide for the Hub to progress its objectives through the development and implementation of projects to deliver against its identified priorities for the next three to five years. To help inform the development of this report, the consulting team undertook interviews with Hub management, committee members, general members, advisors and other regional stakeholders.

Purpose

The purpose of the project is to:

- Confirm the strategic priorities for the Hub.
- Identify streams of project work which can deliver against those priorities, including a rationale for the projects.
- Agree interdependencies and timing for project work.
- Develop a project schedule (action plan).
- Develop a preliminary scope for the identified projects.

Outcomes

The primary project outcome is the development of an actionable program of project work that will underpin the Hub's efforts in addressing its objectives over the next two to three years, as outlined in this report.

METHODOLOGY AND PROCESS

Pre-planning

The consulting team interviewed a wide range of Hub members and stakeholders. The interviews addressed four topics:

- Whether the current priorities are correct and how they should be ranked.
- Whether there are any views about potential projects to include in the action plan.
- What factors about the Hub will drive success.
- What are the impediments to success.

The outcomes of the interviews were consolidated and analysed to establish a view about topics and themes of alignment, as well as priorities for action. The aim of the pre-planning process was to develop a preliminary perspective on potential focus areas.

Based on these interviews, the consulting team developed a pre-planning discussion paper which was circulated to members prior to a facilitated workshop. The pre-planning report identified these issues, provided an industry overview and addressed key challenges and opportunities for the Hub to focus on in developing action priorities.

Planning session

A planning session was held with Hub members on 17 November 2023. The purpose of the planning session was to distil the findings from the pre-planning process and develop a shared view of:

- Refinements to the strategic focus areas.
- Priority focus areas for projects.
- Specific projects and actions.

STRATEGIC REVIEW



SUCCESS FACTORS AND IMPEDIMENTS

Factors underpinning success

Renewal

Following a period of post-fire recovery and consolidation, there has been an active focus on renewal and refocus for the Hub's management structures and processes. There is a recognition of loss of experience with a number of key personnel retiring or stepping back from day-to-day involvement. However, the appointment of a new Hub Manager and attention on revising the strategic plan is viewed as a positive step which will help address this.

Mature market

The region operates as a mature forest and wood products market. It has the capacity to utilise all the fibre that can be produced within the region and has the scale to allow relatively efficient importing of fibre from other regions.

Strong engagement framework

The Hub has a strong engagement model and existing regional networks with key organisations, particularly in NSW, as a result of the long-standing work of the Softwoods Working Group (SWG). While the SWG and the Hub have quite different remits, it provides an important framework for continued engagement with critical institutional stakeholders.

Impediments to success

Perceptions of the industry

Negative community perceptions of the industry have increased, particularly following the 2019/20 fires and exacerbated by other issues such as management of weeds (particularly blackberry) and feral animals and perceptions about industry impacts on road conditions.

Land availability and plantation expansion

The availability of suitable and affordable land, combined with the availability of investible capital (whether from existing private land-owners or larger corporates) is essential for the Hub's continued growth and development.

Fire prevention and response

Another significant fire in the region would result in a substantial industry restructure. The challenges of improving fire prevention, detection and response are considered a very important focus, which includes working more effectively with other land managers and users (e.g. National Parks and agricultural land managers).

Whole of region approach

Historically, the growers and the industry in Victoria and NSW have tended to operate separately, especially in relation to whole-of-industry strategy and planning. There is a recognised need to address this and develop a whole of region approach to key strategic issues.

OPPORTUNITIES AND CHALLENGES

Opportunities

Residues

Maximising the use of residues is considered a major medium-term opportunity. At a macro-economic level, any region in the Asia-Pacific that can produce and maximise the exploitation of plantation fibre is at an advantage because demand will continue to grow. In this context, the existing processing industry has the capacity to utilise all the fibre produced in the region, if it can be cost effectively harvested, loaded and transported.

Engineered wood

There are medium to long term opportunities to explore expansion of EWP manufacture in the region, which may also allow for increased fibre use in construction/solid wood products.

Industry alignment

A critical opportunity identified is for the Hub to focus on improving industry alignment and internal communication particularly between NSW and Victoria. There are several opportunities to look at cross-border efficiencies, regional logistics and infrastructure solutions, community and local government interface and fire.

Carbon markets

There is a general view that improved access to carbon markets will create better opportunities for financially viable plantation expansion.

Challenges

Secure availability of fibre

Secure availability of fibre in the short, medium and long term is the key issue facing the industry in the Hub region. Even prior to the 2019/20 fires, the plantation estate was struggling to meet the input requirements of the region's timber processors. This is recognised as an issue both for the Hub and the Australian industry more broadly. Haulage distance is no longer an absolute barrier for supply. Processors located in the Hub region are potentially competing for limited fibre resource not only with each other but with processors in central NSW, central Victoria and the Green Triangle.

A less immediate but equally important challenge is how to expand the availability of fibre from within and coming into the region. Finding ways to improve fibre recovery and utilisation, lift productivity, expand the plantation footprint and implement logistics solutions for transporting fibre more efficiently from further away are all important areas.

Infrastructure and logistics

Efficient logistics (transport and communication) systems and infrastructure are vital for the success of the forestry sector. The Hub faces multiple infrastructure related challenges, including in relation to roads and communication networks, which impact the efficient harvest and transport of fibre and manufactured wood products.

Engagement and outreach

There is strong agreement among stakeholders that the Hub can improve its approach to broad community awareness of the importance of the forest and wood products sector in the region and the many benefits it can offer. There is also recognition that the Hub's role is limited to its remit under the funding arrangements with the Commonwealth.

REVIEW OF STRATEGIC PRIORITIES

Context

The four strategic pillars are still considered appropriate to the Hub's future priorities. However, there is general agreement that the People and Skills pillar is a lower short/medium term priority.

The industry has managed the significant challenge of post-fire salvage and re-establishment which has been a critical focus. There is now a broad agreement that the revised plan needs to focus on emerging challenges and opportunities, which were identified as:

1. Enhancing future resource security.
2. Improving infrastructure and supply chain efficiency.
3. Improving perceptions of the industry.

There is also a view that the Hub can improve its performance around:

1. Communication clarity
2. Engagement and collaboration
3. Performance in achieving goals

The future availability of fibre is the over-riding strategic challenge for the region, as demonstrated in Figure 2.



Updated priorities

Based on these considerations, it is proposed to refine the strategic priorities as presented below:

Pillar 1: Resource security: priority remains, to be addressed alongside regional security in relation to fire and how that's communicated to decision makers.

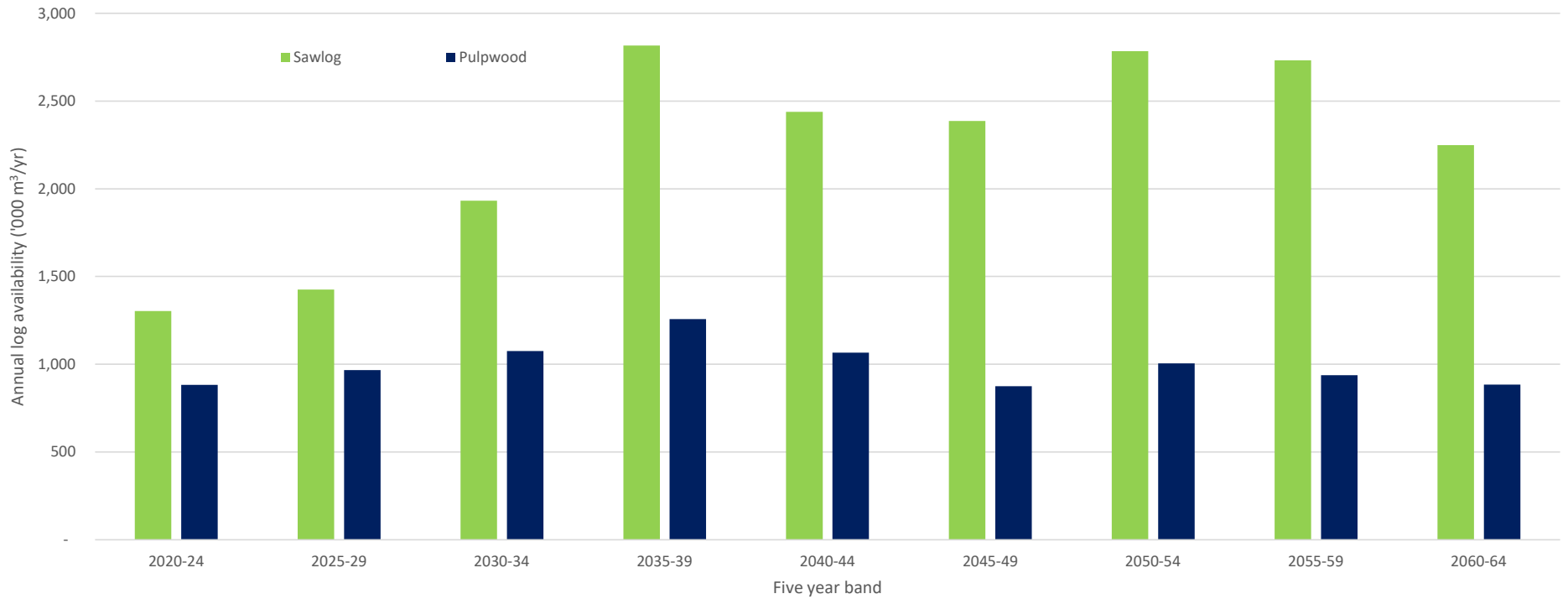
Pillar 2: People and skills: revisit based on understanding of work that can be undertaken with other Hubs and organisations.

Pillar 3: Infrastructure and supply chain efficiency: focus on future wood movements, planning for the road network and transport efficiencies.

Pillar 4: Enhancing stakeholder understanding and engagement: expands on the existing *Community engagement* priority to include a sophisticated community engagement strategy.

These priority focus areas are explored in more detail in the following pages.

FORECAST PLANTATION LOG AVAILABILITY



RESOURCE SECURITY



Context

Short-, medium- and long-term security of fibre supply is the most critical strategic issue facing the forest and wood products sector in the Hub region.

Prior to the 2019/20 fires, the plantation estate was struggling to meet the industry's supply requirements. Following the fires, wood supply levels are not expected to recover until at least the mid-2030s (refer to Figure 2).

If the issue of secure access to fibre cannot be resolved, there is a real risk that manufacturing capacity in the region will contract, with significant negative social and economic ramifications.

Focus

The Hub has previously undertaken a land capability assessment project for plantation expansion.

The priority focus areas for this strategic theme are:

1. Securing sufficient resource over the short to medium term to ensure industry viability.
 - i. Maximising recovery and utilisation of available fibre.
 - ii. Transporting fibre cost efficiently.
2. Maximising plantation productivity, including through addressing recognised weed problems.
3. Ensuring that fire prevention, detection and response capability is adequate to prevent another major loss of plantation area.
4. Attracting investment (including through carbon) to support expansion of the plantation estate to allow future growth and development of the sector.

INFRASTRUCTURE AND SUPPLY CHAIN EFFICIENCIES

Context

A critical element to securing fibre supply is improving the efficiency and effectiveness with which wood can be transported within the region and from other regions.

There is a need to understand:

1. What are the impediments to efficient movement of wood within the Hub region (e.g., bottle necks, distribution efficiencies, limitations on HPFVs)?
2. What are the challenges for improving wood movement into the region (e.g., long haul bottlenecks, back freight arrangements, cost, carbon emissions)?
3. Are there differences between Victoria and NSW which affect road maintenance, truck movements and management of fire protection infrastructure?

Focus

During the planning process stakeholders identified transport efficiencies across the border as a critical focus area. This issue is important with respect to both supply chain function and emissions reduction strategies. There are also important links between this strategic priority and the Resource security priority, particularly with respect to utilisation of resources and cross-state fire protection measures.

Priority projects include:

1. Transport efficiency review.
2. Identifying and resolving transport bottlenecks for enhanced efficiency.
3. Optimising haulage for productivity gains and emissions reduction in the Hub region.
4. Fire protection infrastructure.



ENHANCING STAKEHOLDER UNDERSTANDING AND ENGAGEMENT

Context

Historically, the level of community acceptance for forestry has been high within the Hub region, particularly in comparison to some other forestry regions. There has been a noticeably negative shift in sentiment among the community and landholders, particularly following the 2019/20 fires. This is exacerbated by land management issues such as weeds and feral animals, as well as issues related to infrastructure use, particularly perceived impacts of the industry on road infrastructure.

Addressing the challenges of industry expansion, infrastructure, supply chains, processing and marketing requires the support of local stakeholders. There is, therefore, a need to enhance the industry's profile within the region. This includes highlighting the social and economic importance of the forest and wood products sector, but also identifying ways that the sector can work with local stakeholders to deliver mutually beneficial outcomes, for example in relation to management of local road infrastructure.



Focus

The identified priority for enhancing stakeholder engagement and understanding is the development of a sophisticated communication strategy which will then form the basis of further targeted projects and work.

A shift in approach is needed which delivers a focus on the issues raised by community stakeholders, neighbours and other affected parties, and how industry can address these issues, rather than simply providing information. Priority should be given to:

- Improving the general community's understanding and appreciation of the benefits of a viable and growing industry.
- Improving institutional (government) understanding of the broader economic, cultural, social and environmental benefits of forestry.
- Presenting the region as an attractive and viable destination for forestry investment.

ACTION PLAN



OVERVIEW

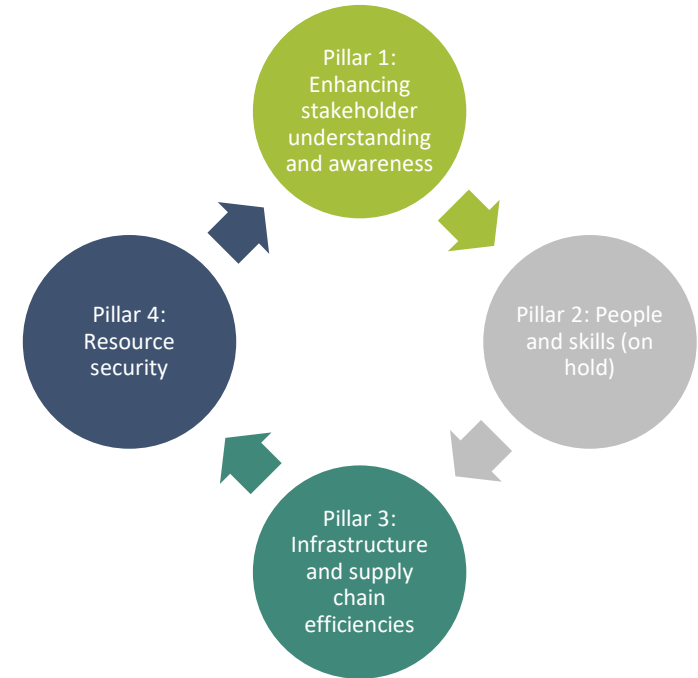


Project identification

Twelve projects have been proposed for the action plan. The projects span three of the four strategic pillars. This section provides a description of each of the proposed projects, including the rationale, project requirements, linkages between strategic priorities and dependencies between projects. The action plan also includes preferred timing and an indicative budget range for each project.

The upper cost range for delivering the projects over the next two to three years is in the order of \$800,000. That requires careful attention to timing and ranking of projects.

Several of the projects can be considered foundation studies, as they will underpin later work to be undertaken by the Hub.



PILLAR 1: RESOURCE SECURITY

Project title	Description and rationale	Linkages and dependencies	Priority (1-5)	Budget (maximum)
1.1 Fibre Recovery, optimisation and utilisation of the MRFH Resource	A comprehensive and thorough review of practices, processes and procedures to identify if, where and how it might be possible to achieve better quality and/or higher fibre yield outcomes using the land resources currently available.	Pillar 3: Infrastructure and supply chain efficiencies <i>(MURR-2023-018 carried over)</i>	4	\$70,000
1.2 Pest and weed situation analysis	This project aims to deliver: <ol style="list-style-type: none"> 1. An improved understanding of the current situation with respect to pest and weed challenges in the Hub region's commercial plantations. 2. Undertake a detailed assessment of the costs and impacts for plantation production and across the broader (including agricultural) landscape. 3. An informed future outlook prognosis for key pest and weed challenges, including whether they are escalating, under control, relatively minor, or non-issues. 4. Insights from global experiences such as New Zealand. 5. Specific recommendations for future management of particular pests and weeds. 	Pillar 1: Enhancing stakeholder understanding and awareness	2	\$45,000
1.3 Blackberry impacts study	Project identifying previous research to date on methods to eradicate blackberries and develop a clear pathway forward for collective action.	4.2 Pest and weed situation analysis <i>(Murr-2022-016 Blackberry Impacts Study; commenced but on hold due to provider issues. Requires resolution)</i>	2	\$63,917
1.4 Optimising plantation expansion	A number of projects have been completed, scoped and/or commenced. This is an overarching project, with sub-themes which aims to consolidate on previous, current and require work. Focus areas include: <ol style="list-style-type: none"> 1. A comprehensive review of the administrative operating environment, including: <ol style="list-style-type: none"> i. Regulatory impediments in each jurisdiction, for each of plantation growing and timber processing. ii. Risks and opportunities for industry expansion 2. Regionally appropriate investment models for scalable plantation expansion. 3. Models to provide incentives for increased commercial plantation establishment integrated into farming systems. 4. Decision support tools and information for landowners to increase forest and wood products sector awareness and remove knowledge barriers 	Entire Pillar <i>(note – can be separated into individual projects but could lose some efficiencies)</i> <i>(Replaces Murr-2020-05: Plantation expansion modelling Stage 1; Murr-2022-017: Farm forestry incentivisation; Murr-2022-015: Decision tree and forest modelling for landowners)</i>	2	\$140,000

PILLAR 1: RESOURCE SECURITY

Project title	Description and rationale	Linkages and dependencies	Priority (1-5)	Budget (maximum)
4.5 Fire management policy paper	<p>Fire is identified as the single biggest risk to the forest and wood products sector's long term viability in the region. There are several institutional challenges with improving fire detection, prevention and suppression frameworks. These include different legislative and regulatory regimes in Victoria and NSW which don't always work well together; differences between tenures (public land, private agricultural land, public plantation and private plantation). Solving these challenges requires commitment and contribution from both the Victorian and NSW State Governments.</p> <p>This project aims to develop a comprehensive Fire Management Policy Paper which identifies:</p> <ol style="list-style-type: none"> 1. Inconsistencies between jurisdictions and land tenures that are an impediment to effective cross-border fire management and plantation protection. 2. Examples of cross jurisdictional fire management for commercial plantations elsewhere in Australia. 3. Opportunities for shared investment, research and innovation to improve regional detection, prevention, suppression and community engagement in relation to plantation forestry. 	Pillar 1: Enhancing stakeholder understanding and awareness	1	\$30,000
4.6 Fire detection technology and infrastructure	A comprehensive review and feasibility assessment of emerging fire detection technology and infrastructure, including investigation of the deployment of similar technologies elsewhere in Australia and internationally. A key focus is on interoperability between NSW and Victoria, and between different landowners and land tenures. Option to expand and consider whole of region fire management support options similar to those operating in other regions.	3.3 Infrastructure and technology requirements for enhanced communications networks	1	\$60,000

PILLAR 2: PEOPLE AND SKILLS

Project title	Description and rationale	Linkages and dependencies	Priority (1-5)	Budget (maximum)
<p>No projects proposed for this Pillar during the planning period</p>				

PILLAR 3: INFRASTRUCTURE AND SUPPLY CHAIN EFFICIENCIES

Project title	Description and rationale	Linkages and dependencies	Priority (1-5)	Budget (maximum)
3.1 Murray Region Forestry Hub Transport Efficiency Review	<p>This project is seen as a high priority as it addresses the immediate need to enhance transport efficiency within plantation areas. The project will aim to determine:</p> <ol style="list-style-type: none"> 1. Where fibre is currently coming from and moving to (location of plantation areas within the Hub region and transport corridors for imported wood) over the next five to ten years. 2. Identification of supply chain physical (weighbridges etc) and regulatory (permits and licenses) bottle necks. 3. Definition of high productivity freight options – desired future state. 4. Modelling and mapping of intra and inter regional annual woodflows (volume and routes), key transport routes and priority areas requiring solutions. 	<p>Pillar 4: Resource security</p> <p><i>(Note: this replaces MURR-2022-1: Infrastructure suitability assessment North East Victoria Stage 1)</i></p>	1	\$130,000
3.2 Optimising haulage for productivity gains and emissions reduction in the Hub region	<p>A project focused on improving transport efficiency and reducing emissions. The aim is to research and present a compelling argument for implementing measures that reduce transport cost and improve carbon emissions outcomes. The project will identify and target priority areas for efficiency improvements and emission reductions, continuing previous efforts and aligning with broader sustainability goals while ensuring optimised productivity within the Hub region. The project will also consider the infrastructure requirements along key haulage routes (e.g. the Hume Hwy) and destinations to support alternative fuels.</p>	<p>Pillar 4: Resource security</p> <p>Pillar 1: Enhancing stakeholder understanding and awareness</p>	2	\$50,000
3.3 Infrastructure and technology requirements for enhanced communications networks	<p>A project to investigate the options available to enhance the communications networks across the more remote parts of the plantation estate.</p>	<p>Pillar 4: Resource security</p> <p><i>(Note: this is the same as MURR-2020-002)</i></p>	2	\$60,000

PILLAR 4: ENHANCING STAKEHOLDER UNDERSTANDING AND AWARENESS

Project title	Description and rationale	Linkages and dependencies	Priority (1-5)	Budget (maximum)
4.1 Regional community engagement strategy	<p>This project aims to transform the sector’s approach to community engagement and move from simply providing information to a more nuanced, regionally appropriate and sophisticated approach. The project aims to identify nuanced communication channels and messages that resonate effectively at the local level, focusing on the needs of the community and addressing their concerns. Proposed approach includes:</p> <ol style="list-style-type: none"> 1. Identification and definition of target stakeholder/community categories. 2. Develop a clear understanding of stakeholder interests, values and engagement needs. 3. Develop audience-specific engagement approaches, materials and methods. <p>The intent is to invigorate local understanding, awareness and support for the sector (particularly plantation management) and contribute insights and strategies that will underpin efforts across other strategic themes (e.g., encouraging landowners to establish plantations).</p>	<p><i>Pillar 2: People and skills</i></p> <p><i>Pillar 3: Infrastructure</i></p> <p><i>Pillar 4: Resource security</i></p> <p><i>(note: it is anticipated that this project will result in a series of follow-up projects)</i></p>	2	\$120,000
4.2 Fire management engagement	<p>Directly links with project 1.1 and can be combined to form one project. The focus of this element is on community education surrounding fire protection of plantations within the Hub region.</p>	<p>Project 4.4: Fire management policy paper</p> <p><i>Note: this is likely to be an ongoing requirement but the project is aimed at establishing the framework and materials for engagement)</i></p>	1	\$25,000
4.3 Sustainable plantation management	<p>Focusing on the region's forestry potential, this project will analyse, quantify and communicate the industry’s optimised potential for carbon sequestration, decarbonisation efforts, and the implementation of circular economy principles across the Hub region. The project aims to develop materials which can be used to inform Government policy and strategy, educate and improve awareness with regional stakeholders and attract institutional and corporate investors to establish plantations and invest in sustainable processing in the region. Specific focus areas include:</p> <ol style="list-style-type: none"> 1. Understanding the industry’s net carbon footprint across the Hub region. 2. Identifying and describing current and potential decarbonisation opportunities and actions. 3. Assessing circular economy opportunities for the region. 	<p><i>Pillar 4: Resource security</i></p> <p><i>(Incorporates Murr-2023-020: Carbon footprint)</i></p>	4	\$50,000