



Forest & Wood Products Australia

2008-2009

ANNUAL OPERATIONAL PLAN

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FOREST AND WOOD PRODUCTS AUSTRALIA LIMITED

ANNUAL OPERATIONAL PLAN 2008-2009

SECTION ONE

Introduction

Forest and Wood Products Australia (FWPA) is a limited liability company formed on 3 September 2007 to be the designated industry service body for the forest and wood products industry. As the successor to the Forest and Wood Products Research and Development Corporation (FWPRDC) the company is responsible to its members and levy payers, and to the Australian Government through a Statutory Funding Agreement (SFA) that allows matching of expenditure on Research and Development (R&D).

This annual operational plan (AOP) 2008-09 establishes the direction for services and solutions to be provided by the company over the next 12 months to maintain and improve the forest and wood products industry.

Strategic plan

In May 2008, the FWPA Board approved the company's first 5-year strategy plan. This plan was formulated following an assessment of Australia's forest and wood products industry prospects and strategic imperatives and a process of consultation with stakeholders.

The strategy plan states the vision, mission and strategies for the company:

VISION

To be the industry's leading source of knowledge, and investor in innovation and promotion.

MISSION

To provide services to the industry, to increase its sustainability and international competitiveness, supported by its communities and markets. These services include direct and collaborative investment in:

- the provision of innovative solutions for the industry, and
- promotion of the industry's products, services and values.

STRATEGIES

1. Promote the benefits and usage of forests and wood products, in accord with changing community attitudes, environmental awareness, and market trends.

2. Invest in and co-ordinate research and development to improve the industry's competitiveness, inform its climate change response, enhance investment, increase usage, and ensure the sustainability of forests, wood products and services.
3. Grow the industry's capacity and capability in knowledge generation and adoption, and promotion, to facilitate expansion.
4. Increase FWPA's capacity and scope to provide services for the industry's benefit.

The Australian Government is a major contributor to FWPA programs through matching R&D funding. The 5-year strategy plan demonstrates how the company's investment priorities align with the Australian Government's national and rural research priorities. These priorities are:

- enhancing the sustainability and efficiency of production systems
- improving competitiveness through a whole of industry approach
- maintaining and extending markets for wood products
- responding to climate change and creating an innovative culture

This AOP should be read in conjunction with the 5-year strategic plan as it represents the first year of the plan's implementation.

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Commitment to transparency

The Board and management of FWPA are committed to the disciplined, transparent and efficient operation of the company and its finances. To this end, each program will be managed in accordance with clear objectives and stringent financial controls.

The success of the company's strategies will be tracked using appropriate key performance indicators (KPIs). However, it needs to be recognised that the measurable success of the company's activities, especially outcomes from R&D programs, can only be evaluated over the long term.

This AOP will be made available to all FWPA members and levy payers via the FWPA website and a summary will also appear in the company's Leading Edge newsletter.

Working together to deliver results

FWPA will work with other industry bodies and Government to deliver positive outcomes for the forest and wood products industry, for regional Australia and for the nation as a whole. To this end, the company operates five Industry Advisory Groups and seeks ongoing and direct dialogue with industry participants, technical and research bodies and industry associations.

FWPA's communication strategy aims to make all key stakeholders aware of the role of the company in the forest and wood products industry, particularly projects undertaken by FWPA, the opportunities created by these projects and their potential industry benefits. This is achieved by the development and delivery of a range of information and services aimed at increasing awareness, demonstrating relevance and value, and proactively engaging stakeholders.

2008-09 budget allocations

In accordance with the company strategies, the AOP budget allocation is based upon an expenditure of \$12.8 million over 2008-09 financial year. Estimated income during 2008-09 will be \$10.7 million with additional funds being drawn from the company's existing cash balance (see income forecast, p.19).

2008/09 budget allocations to FWPA strategies

		% FWPA Expenditure	Budget (\$Mil)
Strategy 1	Generic industry promotion	32%	4.1
Strategy 2*	Investment in industry focused research and development	55%	7.0
Strategy 3*	Knowledge generation & adoption	10%	1.3
Strategy 4	Provision of industry services	3%	0.4
		100%	12.8

Accountability to levy payers

FWPA will quantify and report the investment benefits to levy payers. This is achieved by allocating investment programs in consideration to the source of levies received. For example, tree growers have a greater interest in project outcomes from the sustainability and resources program. Similarly, importers are primarily interested in the promotion and market access and development programs.

FWPA internally assigns and tracks sectoral benefits across projects and programs to ensure that the overall investment profile aligns to FWPA levy contributions. Regular portfolio profile reports are provided to FWPA's Board and Advisory Groups.

* Activities supported under these strategies are reported as eligible for Australian Government matching payments as per the terms of the Statutory Funding Agreement.

SECTION TWO

Strategy 1 – Generic Industry Promotion

Overview

This strategy will promote the benefits and usage of forests and wood products. Specifically, the campaign seeks to generate a positive disposition to the use of wood products and to have wood products specified more widely in both decorative and construction situations. This will be achieved by promoting the positive benefits of wood and addressing any real or perceived impediments to the usage of wood.

Activities within the promotion program will often incorporate the results arising from FWPA funded R&D projects and technology transfer activities.

Priority themes

The following priority themes were identified in the 5-year Strategic Plan:

- Promote benefits of forests and wood products, with emphasis on carbon storage, low embodied energy, renewability, reuse and demonstration of the sustainability of the forest resource.
- Promote forests and wood products/applications over alternatives, and of new applications and services to meet emerging markets.
- Engage with regulators, standards bodies, opinion leaders and specifiers to maximise wood products' specification and utilisation.

Current position

Development of the program was initiated in January 2008 through the engagement of contractors to scope out the program's primary themes and activities based on rigorous market research. An Industry Reference Group, comprised of marketing and communication managers from industry firms and organisations, was established to ensure that the program has strong linkages to other industry promotional activities. A number of key elements of the promotional campaign have been finalised and form a strong base for this AOP.

Proposed actions

- Industry stakeholder engagement prior to launch of the consumer awareness campaign towards the end of the first quarter.
- Prior to launch a benchmark consumer survey will be undertaken to measure awareness and interest in the use of wood products. The survey will be repeated on a regular basis to gauge the impacts and effects of the campaign.
- Depth and reach of the campaign will be expanded during the year to a range of audiences including trade shows, special seminars; development of additional collateral material etc
- Linkages to other industry promotion initiatives will be developed.

Investment budget

Investment Program	Budget allocation (\$Mil)	Existing commitments (\$Mil)
Generic industry promotion	4.1	0.0

Key performance indicators

The KPIs of this program will include the following:

- Consumer and specifier recall of the program activities.
- Improvement in consumer and specifier perceptions of wood and forest products
- Increase in purchase intent by consumers and specifiers of wood and forest products in decorative and construction applications.

The above KPIs are proxy measures for the program's success. In the long-term, the program will be successful if wood and forest products maintain or increase their market share across a range of applications. However, market shares will be impacted by activities outside the company's control (e.g., price, distribution, availability), so they cannot be used as workable KPIs.

Strategy 2 – R&D Investment

Overview

Activities covered within this strategy constitute approximately 60% of the investments made by the company for 2008-09. R&D project investments are managed and reported under three programs representing the industry value chain: (1) Market Access and Development; (2) Solid Wood Processing; and, (3) Sustainability and Resources.

The primary outcome from the Market Access and Development program is the recognition, development and exploitation of new market opportunities for forest and wood products. Priority research areas include increased understanding of market attitudes to the use of wood, as well as the environmental and design attributes of timber building products. The results from this program will be used by industry to support the expansion of current markets as well as assist in the removal of regulatory and market barriers to the use of timber products in domestic and commercial building applications.

Projects funded within the Solid Wood Products program are targeted at identification and development of improvements to existing manufacturing through maximum value recovery from the resource. Priority areas include optimisation of chemical/energy use, waste stream utilisation and the development of new products including hybrid materials.

The Sustainability and Resources program is a substantially new R&D area for the company following the introduction of the forest grower levy. Program investments will target the generation of knowledge of the impacts of management on the functional processes of forests managed for wood production, decision support systems for forest management, economically efficient and low environmental impact forest operations, scientifically based forest certification and provision of new environmental services. Other priorities include applied knowledge of the wood properties of the forest resource, development and adoption of improved techniques for the segregation of standing trees, logs, timber and fibre to the most appropriate use and identification of methods to improve wood properties.

Priority themes

The following priority themes were identified in the 5-year Strategic Plan:

- Engage with regulators, standards bodies, opinion leaders and specifiers to maximise wood products' specification and utilisation
- Evaluate market trends nationally and internationally to enable industry to develop business and growth strategies
- Maintain and expand markets for wood products and the new products and services required to meet these markets
- Enable industry's continuous improvement and adoption of best practice

- Develop knowledge and technology to improve existing production and utilisation processes
- Develop systems and technologies to optimise water productivity and efficiency
- Engage with the community to comprehend and seek to meet its needs
- Assist industry to access knowledge and technologies developed elsewhere
- Evaluate strategies for forest management under climate change and maximise greenhouse advantages of forest products
- Characterise the properties and variability of wood resources and maximise value recovery
- Enable genetic improvement and the management of biotic or abiotic risk factors

Current position

Current FWPA funded projects in the Market Access and Development program are grouped around the four priority areas identified by the Advisory Group:

- consumer research
- market intelligence resources
- building systems
- sustainable construction.
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Ongoing projects within the Solid Wood Products program include characterisation and improvement of systems relating to the following:

- in-service durability and service life prediction
- segregation and grading;
- measurement of physical and biophysical properties
- optimisation of timber drying systems
- increased utilisation of timber in value adding industries.

A further research area of increasing importance relates to the measurement and control of volatile organic compounds from engineered wood products and consequential effects on indoor air quality.

FWPRDC established a number of research projects investigating the impacts of management on the functional processes of forests managed for wood production, decision support systems for forest management, genetic improvement of major species and scientifically based forest certification.

Under FWPA, investment in these activities and other aspects of forest management and development of the forests of the future will be expanded in recognition of the additional resources derived from grower levy contributions.

Proposed actions – Market Access and Development

- Analysis of renovation and alterations market; mechanisms for ongoing analysis and reporting of timber product use within the residential building sector; ongoing market analysis and reporting systems.
- Community attitudes and acceptance survey.
- Development of a national timber market survey to collect and report industry data relating to the supply and quality of log resources as well as market prices of major timber product classes and short term forecasting of market demand.
- Development of industry codes of practice relating to the procurement and distribution of imported timber products from identified regions previously linked to illegal logging operations.
- Initiation of a life cycle analysis program quantifying the environmental and performance attributes of contemporary housing designs.
- Development of alternate standards development and maintenance systems.

Proposed actions – Manufacturing, Processing & Products

- Development of industry manufacturing standards and development of design software for structural engineered wood products (I-beams and LVL planks).
- Identification of innovative products and market applications from low grade timber.
- Literature review of relationships between final moisture content in processed softwoods and in service performance (warp/twist).
- Verification of stiffness/strength relationships for structural timber products including minor mechanical properties as referenced in current standards.
- Development of enhanced acoustic segregation systems for use in hardwood and softwood processing.
- Durability enhancement and validation of H2 envelope treatments and verification (chain of custody of treated timber).
- Energy and water conservation in timber drying.

Proposed actions – Sustainability and Resources

- Review results of FWPRDC/FWPA water research projects and linkage with new National Water Commission funded projects to determine priorities for further R&D investment in forest water use, water quality and productivity.
- Develop practical biodiversity measures for multiple use forests and partially forested landscapes.

- Produce a compendium and evaluation of chemical pesticide alternatives and offsite impact monitoring techniques for chemical pesticides.
- Examine carbon dynamics in native forests and plantations in response to management and risk factors including climate change.
- Further develop application of remote sensing technologies in forest inventory and forest health surveillance.
- Review Plantation Industry Biosecurity Plan to determine key R&D priorities.
- Continued development of capacity to integrate genetic information into breeding strategies to accelerate the rates of genetic gain in major plantation breeding programs.
- Efficient application of new technology in forest operations.

Investment budget

Investment Program	Budget allocation (\$Mil)	Existing commitments (\$Mil)
Market access and development	2.1	1.2
Solid wood processing	2.8	0.8
Sustainability and resources	2.1	0.8
Total	7.0	2.8

Key performance indicators

The short term indicators of program success are the following:

- Projects completed on time and on budget.
- Projects developed and contracted in line with Advisory Group input and priority themes.
- Agreed adoption plans for major project outputs and dissemination of project outputs in a timely fashion.

In the longer term, the measures of success will include adoption of research findings and improved commercial and environmental outcomes.

Strategy 3 – Knowledge generation and adoption

Overview

Outcomes from this strategy are delivered through investment in the dissemination of information and technology transfer activities including workshops, seminars, field trips, industry presentations by key researchers, scholarships, fellowships and research training and other professional skills development activities.

Priority themes

The following priority themes were identified in the 5-year Strategic Plan:

- Develop knowledge and technology to improve existing production and utilisation processes.
- Engage with regulators, standards bodies, opinion leaders and specifiers to maximise wood products' specification and utilisation.
- Disseminate R & D outputs and maximise and accelerate knowledge adoption and technology uptake.
- Assist industry to access knowledge and technologies developed elsewhere.
- Enable industry's continuous improvement & adoption of best practice.
- Selectively develop educational initiatives to lift people's interest in, and skills for, the industry, its networks and research providers.
- Increase the industry's contribution to FWPA's Priority Themes.

Current position

FWPA is supporting of a range of fellowship and scholarship programs to foster the development of additional national research capacity in areas of industry priority. FWPA allocates scholarship funding to support the studies of up to three new postgraduate students each year, in addition to its ongoing support to the CRC for Forestry which is scheduled to fund more than 60 PhD students over its seven year term.

Other fellowship programs supported to increase industry research and leadership capacity include the World Forest Institute Fellowship, the Denis M. Cullity Fellowship and support for a forest industry candidate to undertake the Australian Rural Leadership Program (funded on an alternating basis i.e. once every second year).

Resources are also committed within this program to provide sponsorship to major industry related conferences, seminars and workshops aligned with

industry technology transfer and implementation as well as the coordination of regional industry project seminars.

Additional activities currently supported under this program include the sustainability broker project, smaller ad-hoc projects for the compilation and production of technical and educational resources to improve community awareness of the industry and its products and processes across a broader audience.

Proposed actions

- Recruitment of a marketing and communication manager to coordinate and manage FWPA's knowledge transfer and promotion activities.
- Maintain existing fellowship/scholarship program including the Denis M Cullity Fellowship, World Forest Institute Internship and Department of Agriculture Fisheries and Forestry's Science and Innovation Awards for Young People.
- Development of resource materials to support the training of quality control personnel involved in the production of structural timber products.
- Call for applications for three postgraduate students to undertake research degrees in industry identified priority areas.
- Commit resources to support a revised knowledge broker program for the wood processing industry.
- Electronic publication of project reports including hardcopy publication and distribution of selected broader interest reports.
- Operation of FWPA's Advisory Groups to develop strategic advice regarding industry research priorities and adoption strategies for completed projects.
- Targeted industry technology workshops and seminars to be coordinated with the completion of major research projects or programs and sponsorship of significant industry conferences and other technology transfer events.
- Upgrade FWPA's internet presence to increase site useability and uptake of information.

Investment budget

Investment Program	Budget allocation (\$Mil)	Existing commitments (\$Mil)
Services and capability	1.3	0.2

Key performance indicators

The short term indicators of program success are the following:

- Increased consumption of research findings through download from the Internet or other methods (e.g., attendance at seminars)
- Number of page views at the FWPA websites
- Stakeholder feedback on the relevance and useability of our communication program

In the longer term, the measures of success will include adoption of research findings and improved commercial and environmental outcomes.

Strategy 4 – Provision of industry services

Overview

This is a new area of activity for FWPA. Consistent with its expanded scope as an industry services body, the company will develop additional services and products for its members and the wider industry beyond R&D investment and industry promotion.

Priority themes

The following priority themes were identified in the 5-year Strategic Plan:

- Grow FWPA's role in industry services provision through the creation of new revenue streams.
- Improve the value of FWPA's outputs, increasing stakeholders' use of its services.

Proposed actions

Consult with industry and review the scope of industry services (beyond R&D and Promotion) that the company could develop.

- Develop a company response to the current review of standards setting and maintenance activities for the wood products industry
- Engage in discussions with the pulp and paper industry in relation to participation in FWPA or joint initiatives in promotion and R&D.
- Review and analysis of current systems for collection and reporting of industry production statistics.

Investment budget

Investment Program	Budget allocation (\$Mil)	Existing commitments (\$Mil)
Member services	0.4	0.0

Key performance indicators

- Acceptance by the FWPA board of a business plan for the development of industry services.
- Launch of at least one new service during the financial year.

SECTION THREE

Research capability and capacity

FWPA contracts its R&D projects with a broad range of research providers including for-profit and not-for-profit companies, State and Commonwealth agencies, the CSIRO, universities, cooperative research centres and individual consultants. The selection of research providers is based on the following criteria: reputation and standing within industry, prior performance, extent of demonstrable industry collaboration and linkages, value for money, and proposed delivery timeframes and budgets.

There have been some structural changes in the supply of research services to FWPA and the industry. The CSIRO announced its decision to restructure its Division of Forest Biosciences as of 1 July 2008 and to allocate scientific staff across other CSIRO research divisions. Traditionally, CSIRO contracts account for approximately 30% of the FWPA active project portfolio and investment. Therefore, it is expected that FWPA will need to undertake greater coordination of projects to ensure that research outcomes are not compromised by the new structure.

In addition, the CRC Wood Innovations will formally complete its research term on 30 June 2008 with the associated reduction in research capacity.

FWPA may need to develop alternative capacity with other research providers, including possible increased levels of investment with international research groups, to meet its commitments in R&D investment under the 5-year strategy plan.

Research and development partnerships

Partnerships allow FWPA to leverage its investment and to expand industry access to R&D effort and results, especially in specific priority themes. For example, FWPA currently invests in the Joint Venture Agroforestry Program (JVAP) with partners being the Rural Industries Research and Development Corporation (RIRDC) and Land and Water Australia (LWA). Other partnerships include the CRC Forestry, and the Wood Quality Initiative (WQI) Inc, which is a Foundation for Research Science and Technology of New Zealand (FRST) research consortium.

The Australian Government has funded a Climate Change and Forestry Adaptation Plan to be invested in addressing knowledge gaps about the impact of climate change on forestry and the vulnerability of forest systems. FWPA has indicated its willingness to assist in the management of the research projects that might be associated with this initiative.

In addition to the above partnerships, FWPA also participates in the Council of Chairs of Rural Research and Development Corporations, which is the peak collaborative body for the Research & Development Corporations (RDCs) and Industry Services Bodies. Joint initiatives include communication in relation to the

collective outputs of RDCs/industry services bodies and quantitative evaluation of research projects and FWPA will continue to support these activities in 2008-09.

A number of emerging collaborative activities between RDCs, particularly the Climate Change Research Strategy for Primary Industries, will be evaluated on a case by case basis to determine their benefit to FWPA levy payers and members.

Company administration

The management of FWPA is accountable to the Board and aims to provide accurate, timely and meaningful information to the Board, and also to key stakeholders. All key company functions are undertaken by FWPA staff, but where necessary, additional resources may be contracted on an as needs basis.

Compliance reporting

For 2008-09 FWPA will meet all obligations and compliance requirements set out in the following:

- The Constitution of Forest & Wood Products Australia Ltd
- The Statutory Funding Agreement between FWPA and the Commonwealth of Australia, represented by the Department of Agriculture, Fisheries and Forestry
- Enabling legislation in the form of the Forestry Marketing and Research and Development Services Act 2007 (Cth)
- The Corporations Act 2001 (Cth) as amended from time to time
- The Australian Security and Investments Commission

Proposed actions

- Establish a program of internal audit to review and improve internal control procedures, especially those issues identified in the Risk Management Plan.
- Undertake appropriate training of staff based on a skills gap analysis.
- Continue interactions with Levies Revenue Service to ensure full coverage and efficient collection of revenue.
- Refine management reporting to provide accurate and timely information, especially on program expenditures.
- Undertake membership recruitment to achieve a minimum of 150 voting members and develop a policy for recruiting and approval of associate members.
- Support Industry Advisory Groups (R and D) and other stakeholder forums to assist in priority identification, project development and knowledge dissemination.

- FWPA will continue its' participation in the Council of Chairs of Rural Research and Development Corporations' (CCRRDC) evaluation programme.
- As a new company a plan for benchmarking a number of aspects of FWPA's operations will be developed in the latter part of 2008-09.
- Negotiate future arrangements for JVAP with RIRDC and LWA as the current program expires on 30 June 2009.
- Continue investment in CRC Forestry and define and contract a new project relating to forest operations with that CRC.
- Complete the WQI investment program and the communication of the key results and technology opportunities with softwood processors.
- Negotiate terms of participation and the research programme for the proposed Solid Wood Initiative Inc research consortium.
- Finalise participation in the Structural Timber Innovation Company research consortia and participate in implementation of the research programme from early in 2008.

Key performance indicators

- Audit reports provide independent verification of appropriateness of the financial and management systems implemented by FWPA.
- All legal compliance reports completed accurately and submitted on time.
- Maximum revenue received via levies collection.
- Complete evaluations to meet requirements of the CCRRDCs programme.
- Increase the number of voting members to at least 150.

Income forecast

Projected FWPA income for 2008-09 is \$10.7 million, an increase of \$1.0 million on estimated actual income for 2007-08 of \$9.7 million.

Types	Income	
	2007-08 Estimated Actual (12 months) (\$Mil)	2008-09 Forecast (\$Mil)
Processor Levy		
	Cypress	0.04
	Woodchip	0.28
	Hardwood*	0.59
	Ply Veneer	0.09
	Softwood Sawlog	2.02
	Wood Panel	0.10
	Softwood LG & RW	0.15
Compulsory Grower Levy		0.25
Voluntary Grower Levy		0.25
Importer Charge		1.00
Total Levy		4.76
Interest		0.45
Government Matching		4.50
Total Income		9.71
		10.71

Notes:

1. Income levels for FWPA depend on economic (construction and level of imports) activity and levels of resource access.
2. The major increase in FWPA income in 2008-09 will come from the grower levies, however in future years growth is expected to be from projected growth in hardwood export woodchips.
3. For 2008-09 it is expected net domestic levy income will be stable while revenue from the imported timber charge is forecast to decline.
4. Government matching is based upon 50% of the budgeted R&D expenditure of \$8.3 million.

Addressing rural research and national research priorities

The new Rural R&D Priorities complement and are informed by the Australian Government's national Research Priorities, which highlight areas of particular social, economic and environmental importance to Australia, and where a whole-of-government focus has the potential to improve research and broader policy outcomes.

National Research Priorities address areas of strength, opportunity or need in Australian research. The alignment of FWPA R&D strategies and investment programs against Rural R&D Priorities and corresponding national Research Priorities are shown in the following tables.

Most FWPA investment programs deliver outcomes across a number of national and rural priorities and for the purpose of forecasting, R&D expenditure benefits have been attributed uniformly across the relevant priorities.

R&D expenditure estimates across Rural Research Priorities – 2008/09

Rural R&D Priorities (RRDP) FWPA R&D Program	Productivity and Adding Value (\$m)	Supply Chain and Markets (\$m)	Natural Resource Management (\$m)	Climate Variability and Climate Change (\$m)	Biosecurity (\$m)	Supporting the Priorities		Other Research (\$m)	Total (\$m)
						Innovation Skills (\$m)	Technology (\$m)		
Market access and development	0.7	0.7		0.7					2.1
Wood processing and products	0.6	0.6		0.6		0.6	0.6		2.8
Sustainability and resources	0.3	0.3	0.3	0.3	0.3	0.3	0.3		2.1
Technology transfer and industry knowledge adoption	0.2	0.2	0.2	0.2	0.2	0.2	0.2		1.3
Total Expenditure	1.7	1.7	0.5	1.7	0.5	1.0	1.0		8.3

R&D expenditure estimates across NRP Goals – 2008/09

National Research Priorities (NRP) FWPA R&D Program	An Environmentally Sustainable Australia (\$m)	Promoting and Maintaining Good Health (\$m)	Frontier Technologies for Building and Transforming Australian Industries (\$m)	Safeguarding Australia (\$m)	Total (\$m)
Market access and development		0.7	0.7	0.7	2.1
Wood processing and products		0.9	0.9	0.9	2.8
Sustainability and resources	0.7		0.7	0.7	2.1
Technology transfer and industry knowledge adoption	0.3	0.3	0.3	0.3	1.3
Total	1.0	1.9	2.6	2.6	8.3