



Polish wood industry

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Polish Economic Chamber
of the Wood Industry



POLSKA IZBA GOSPODARCZA PRZEMYSŁU DRZEWNEGO

POLISH ECONOMIC CHAMBER OF THE WOOD INDUSTRY

Polish Economic Chamber of Wood Industry is a self-governing whole-Poland organization, established in January 1994.

Almost all of the major enterprises and institutions of the branch are associated by the Chamber and the wood processing capacity of the member enterprises constitutes the best part of the Polish woodworking industry.

At the moment we have 155 members. Among our members there are producers of sawn softwood (pine, spruce) and hardwood (oak, beech), flooring boards, parquet, mosaic, glued elements, wooden houses, garden equipment, wide range of half finished products, pallets etc.

To become a member of the Chamber, on full voluntary basis, can be any entity engaged in the processing of wood or activities related with it, located in Poland. The current list of our Members is available on the www.przemysldrzewny.pl



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POLISH ECONOMIC CHAMBER OF THE WOOD INDUSTRY

Chamber`s mission:

PIGPD mission is to actively promote the development of widely understood Polish wood industry, the integration of entrepreneurs and initiating cooperation between them.

Main activities:

- Politics
- Promotion
- Cooperation



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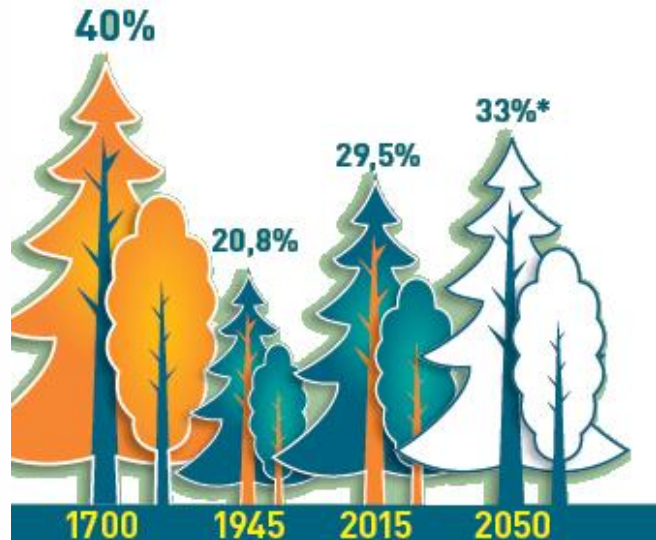
FORESTS IN POLAND

FORESTS AREA IN POLAND: 9,4 mln ha

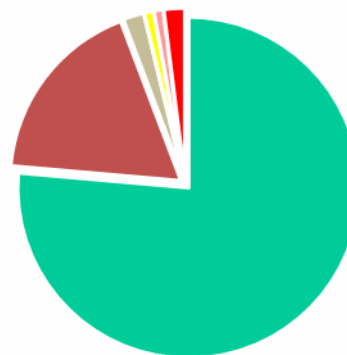
UNDER THE MANAGEMENT OF THE SF: 7,4 mln ha



FOREST COVER IN POLAND



OWNERSHIP STRUCTURE



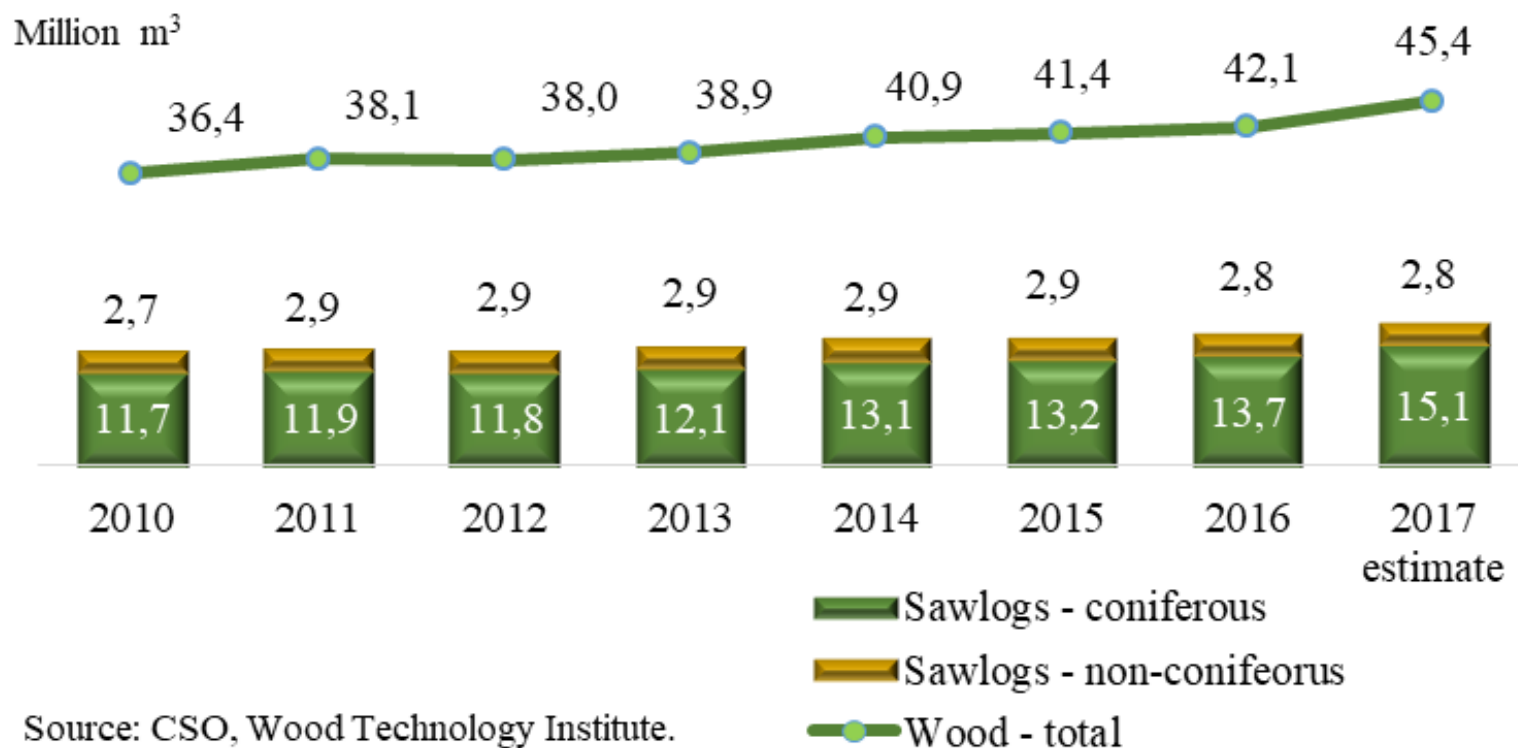
- | | |
|----------------------|----------------------------|
| ■ 77% State Forests | ■ 18% individual ownership |
| ■ 2% national parks | ■ 0,9% other state owned |
| ■ 0,9% commune owned | ■ 2% other privately owned |



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POLISH WOOD INDUSTRY – raw material base

**Fig. 3. Wood removals in Poland
in the years 2010-2017 (from forest and afforested areas)**



Source: CSO, Wood Technology Institute.



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POLISH WOOD INDUSTRY – PRODUCTION cont.

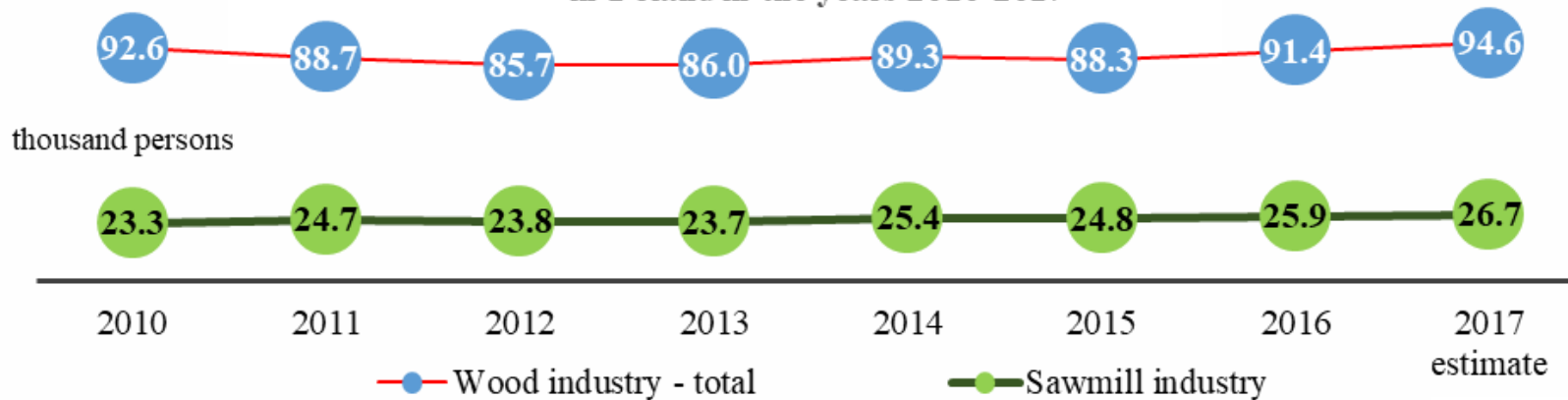
Production of main wood products in Poland in 2010-2017

Product	2010	2011	2012	2013	2014	2015	2016	2017
Lumber (ths. m ³)	8.050	8.310	8.125	7.915	8.540	8.620	8.830	9.360
- Softwood	6.650	6.800	6.640	6.485	7.080	7.220	7.460	7.930
- Hardwood	1400	1510	1485	1430	1460	1400	1370	1430
Veneer (ths. m ²)	34.800	31.987	26.844	25.081	25.230	24.882	22.549	24.350
Wood floorings materials (without parquets ths. m ²)	14.365	9.822	7.824	7.161	6.546	6.993	6.511	7.150
Parquets (ths. m ²)	38.960	44.990	49.381	52.829	58.859	60.205	63.908	66.450
Palets (ths. pcs.)	46.424	53.511	73.132	83.806	90.024	101.229	106.741	122.000



POLISH WOOD INDUSTRY - employment

Fig. 2. Average employment in the sawmilling industry in Poland in the years 2010-2017



Data concern economic entities employing more than 9 persons.

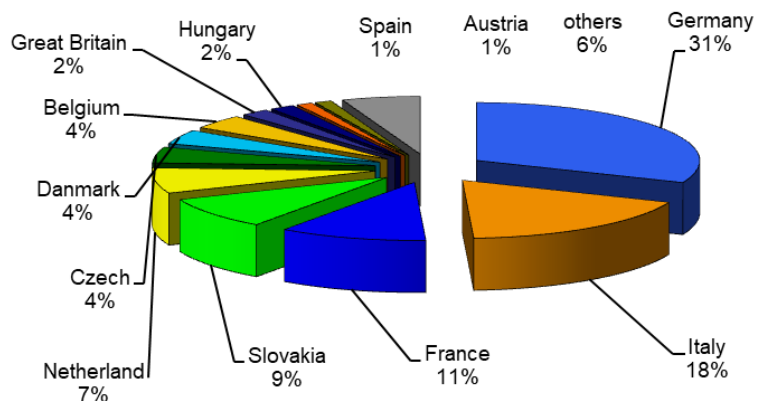
Source: CSO, Wood Technology Institute.

Employment in sawmilling industry in years 2010-2017 increased of 14%.

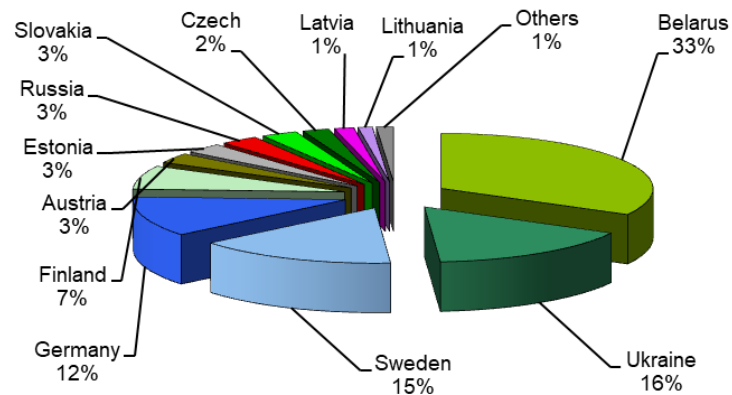


POLISH WOOD INDUSTRY – international trade cont.

**Geographical structure of export
of softwood lumber in 2018**
total volume: 816,1 ths. m³

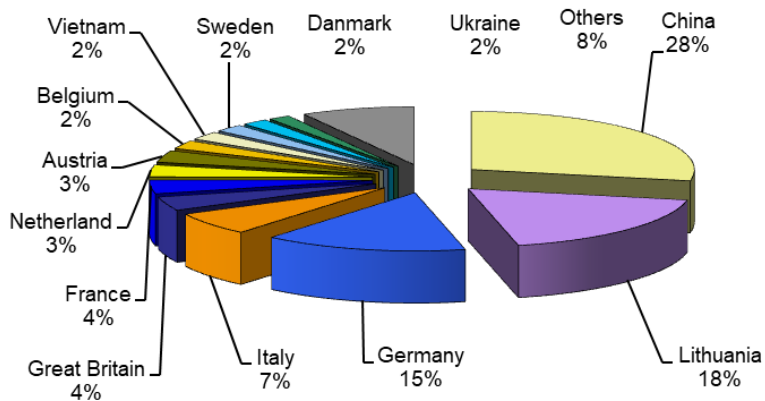


**Geographical structure of import
of softwood lumber in 2018**
total volume: 974,1 ths. m³

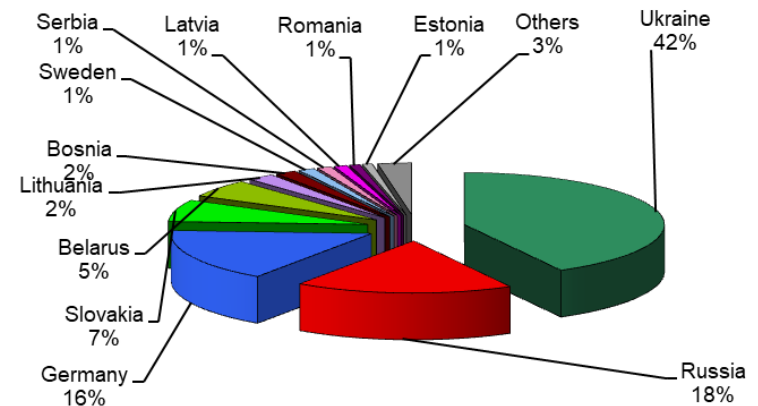


POLISH WOOD INDUSTRY – international trade cont.

**Geographical structure of export
of hardwood lumber in 2018**
total volume: 175,9 ths. m³



**Geographical structure of import
of hardwood lumber in 2018**
total volume: 268,6 ths. m³



Export of wood and wood products, 2017 – 2018

Product	2017		2018	
	Unit of measure	Volume	Units of measure	Volume
Total firewood	m ³	2.006.988,2	m ³	2.311.238,8
Total roundwood	m ³	3.009.402,2	m ³	5.522.703,4
Total sawnwood and half-finished products	m ³	878.577,3	m ³	993.778,9
- softwood	m ³	703.067,5	m ³	816.056,7
- hardwood	m ³	173.585,3	m ³	175.861,8
Wooden packaging materials	m ³	2.164.578,1	m ³	2.584.228,8
Total flooring materials	m ³	221.058,6	m ³	214.192,8

Source: CSO, CAAC



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Import of wood and wood products in 2017-2018

Product	2017		2018	
	Unit of measure	Volume	Units of measure	Volume
Total firewood	m ³	1.859.363,8	m ³	2.556.764,8
Total roundwood	m ³	2.063.997,1	m ³	1.168.549,1
Total sawnwood and half-finished products	m ³	1.078.191,2	m ³	1.259.306,1
- softwood	m ³	768.906,1	m ³	974.116,1
- hardwood	m ³	293.979,3	m ³	268.620,6
Wooden packaging materials	m ³	296.916,7	m ³	363.585,4
Total flooring materials	m ³	52.486,6	m ³	71.564,4

Source: CSO and CAAC



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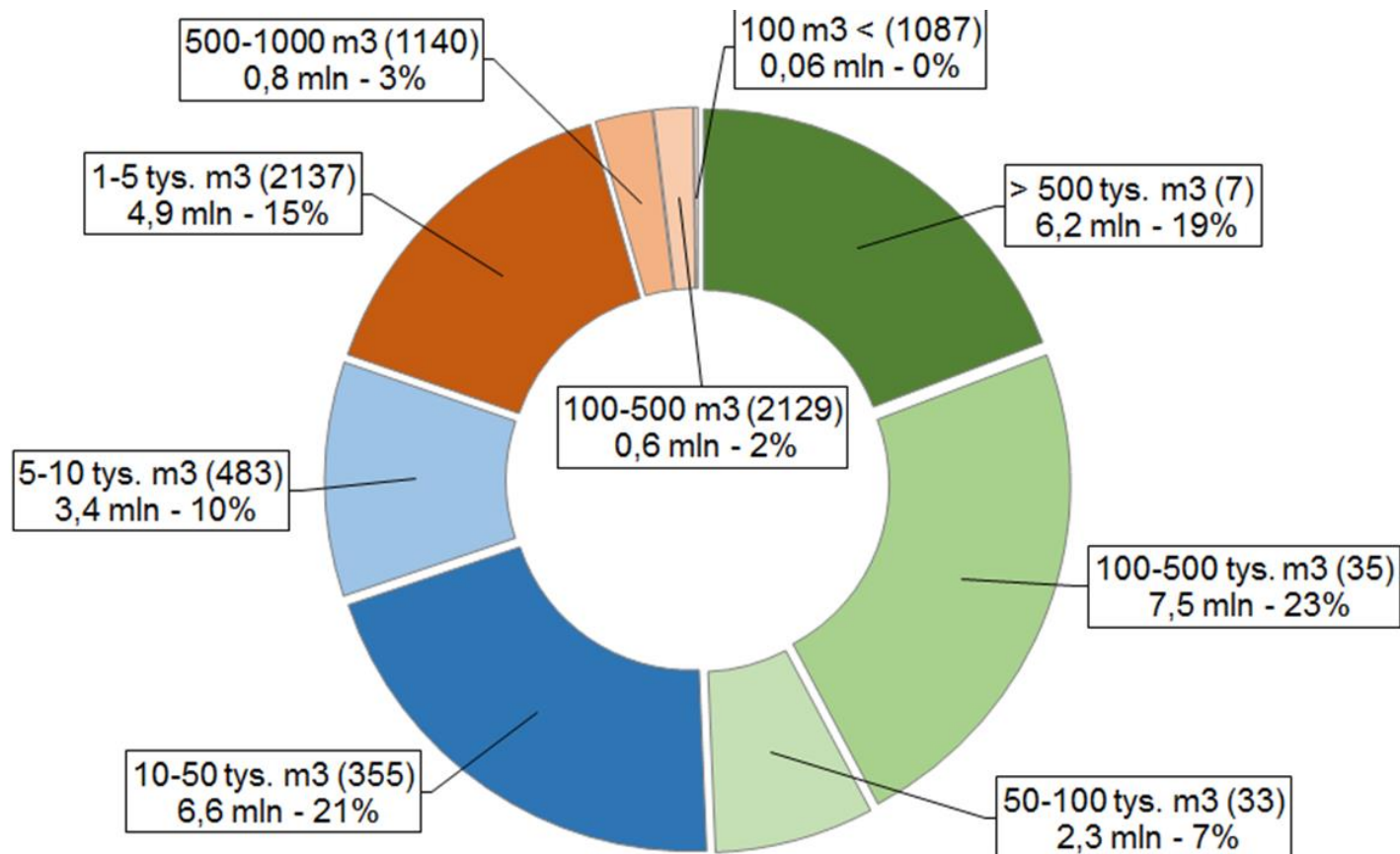
Who buys roundwood in Poland?



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Structure of the wood industry in Poland

Structure of roundwood buyers from National Forests in 2015 (in mln. m3 and % of total mass)



Structure of the wood industry in Poland *cont.*

- *there are 6.976 enterprises that processing up to 10,000 cu.m of roundwood per year, make up 94% of all buyers, but have market share of only 30%,*
- *there are 355 enterprises that processing from 10,000 to 50,000 cu.m of roundwood per year make less than 5% of all buyers and have market share of 21%,*
- *75 enterprises process over 50,000 of cu.m of roundwood per year make 1% of all units, but have market share of as much as 49%.*



FSC in Poland

Total certified area – 6.956.269ha (9.4mln ha total)
– 4th place in Europe after Russia, Sweden and Belarus

Number of FSC CoC certificates:

* September 2019 – 2.016 (4th place in Europe after Italy, UK and Germany)

* September 2012 – 760 (5th place in Europe)



Main determinants of FSC development in Poland

- ❖ Monopoly of State Forests in roundwood supply in Poland
- ❖ Export of wooden products orientated on Western European market
- ❖ FSC as a synonym of legality
- ❖ Increase of people's wealth, that change the perception of environment and impact of human on Earth
- ❖ Sustainable politics of biggest market players – to end of September 2019 IKEA committed its suppliers to certify products with FSC 100%, FSC Mix Credit, FSC Mix 100% or FSC Recycled, also large supermarkets like LIDL, ALDI or Biedronka committed same politics, but towards paper



Challenges for FSC in upcoming years in Poland

State Forests policy towards FSC certification:

- will keep certification?
- what part of forest area will keep it?
- costs issue – who will pay for it?

Revision to National Forest Stewardship Standards

- Long and hard negotiations.
- Very difficult to find compromise between NGO's, industry and State Forests.



Challenges for FSC in upcoming years in Poland *cont*

Increasing significance of private forests:

Period	Harvesting		
	State Forests	Other forests	Total
	ths. m ³ without bark/year		
2017–2020	40.504	5.887	46.391
2021–2025	42.104	6.230	48.334
2026–2030	43.880	6.696	50.576

Source: Draft of National Forest Accounting Plan – Ministry of Environment



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Challenges for FSC in upcoming years in Poland *cont*

Change in perception of wood by society:

- Wood is sustainable material for construction – Polish Wooden Houses
- Wood is ecological – harvesting in accordance with the strict rules (FSC?) does not harm the environment
- Sustainable managed forests will support us with decreasing pollution





Thank you for your attention!

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the Wood Industry
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