PKE 80

CONFERENCE IN THE SEJM OF THE REPUBLIC OF POLAND | 26 OCTOBER 2026

The Forest Unites Us

Green Deal for the Forest-Based Sector in Poland: Deal or No Deal?

Presenting: Piotr S. Mederski, Mariusz Bembenek

The Forest Management Plan vs. manual control of timber harvesting

Where does the timber go after administrative exclusions?

Polish Ecological Club 80 (PKE80) • Forest Policy Section

Based on: Łukasz Duszyński, “Oversight Without a Balance Sheet”, and Piotr Walter, “Poland’s Timber Resource Balance”

PKE80 / FOREST POLICY SECTION MANIFESTO

You don’t manage a forest with a megaphone.

SCIENCE

Management cannot be restricted without defining the goal, the effect and the method of assessment.

PLAN

The FMP allowable cut cannot be controlled without information on execution and the balance.

MARKET

There is no compensation without species, assortment, location and timing.

TRANSPARENCY

There is no serious dialogue when a document goes out for review, yet the reply to an access request announces a refusal.

PKE80 does not defend every mistake made by the State Forests. It defends the right to data, to due procedure and to accountability.

20%

A political target, or the result of analysis?

WHAT A NUMBER LIKE THIS NEEDS BEFORE IT BECOMES POLICY

1. **Denominator**
   20% of what, exactly?
2. **Criteria**
   Which rules select the areas?
3. **Specific areas**
   Which compartments, where?
4. **Impact on FMP and supply**
   What does it cost in timber?

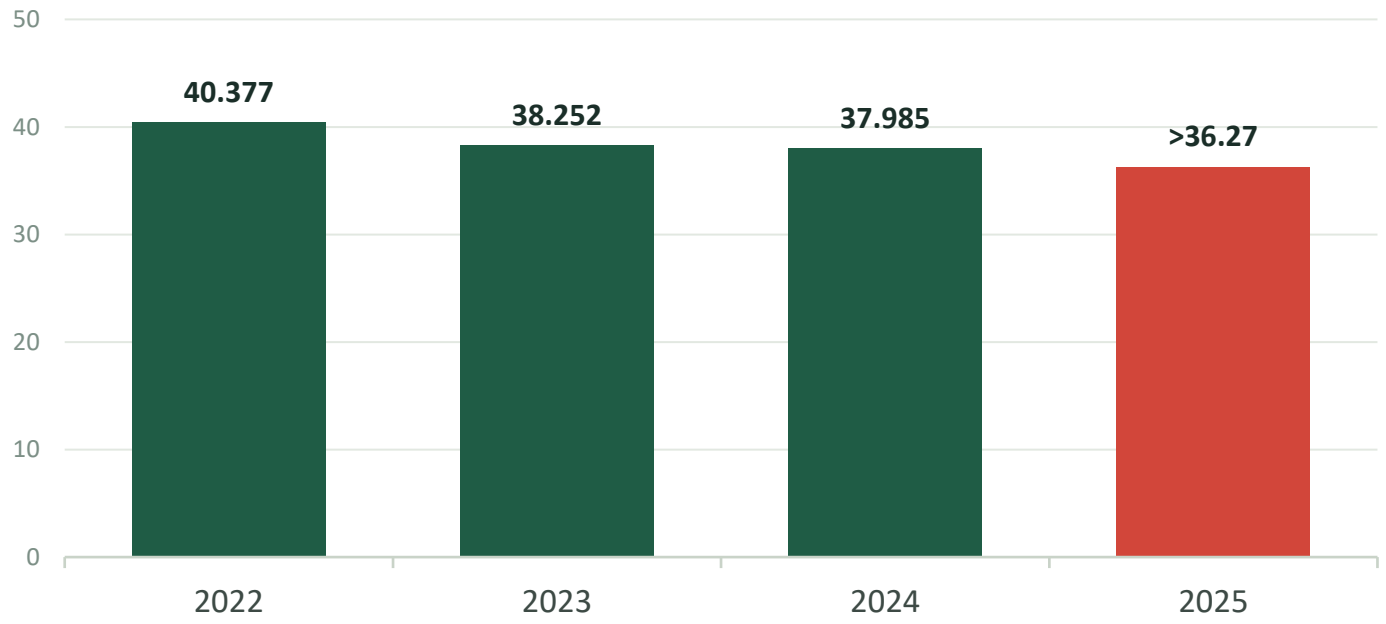
A coalition agreement can point the direction. It does not, however, replace the stand inventory, the resource balance or the impact assessment.

Large-Timber Harvest Has Fallen Since 2022

SUPPLY

Net large-timber harvest in the State Forests

million m³, net (without bark)



FACT / ANALYSIS

−10.2%

2022 → 2025

Net large-timber harvest in the State Forests fell from 40.377 to just over 36.27 million m³.

State Forests only, not all forests in Poland. No full annual data for 2026 yet.

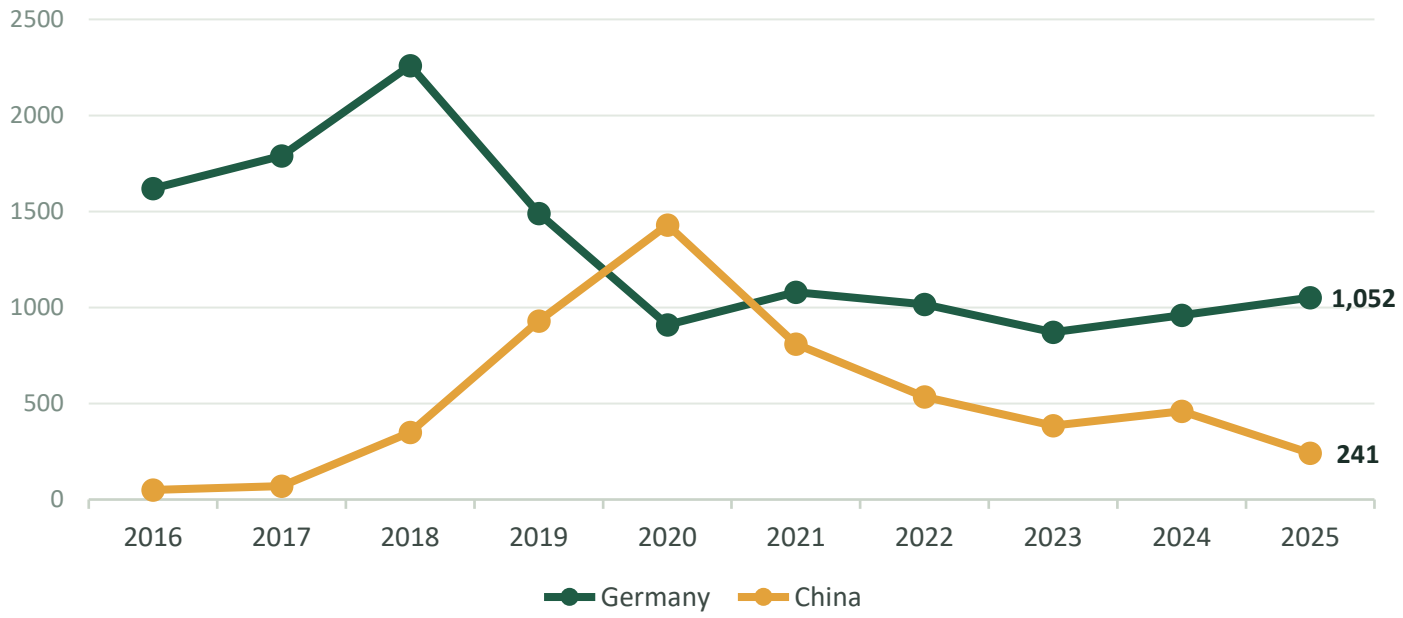
Less timber is already reaching the market: harvest is down by a tenth in three years.

Source: State Forests, data for 2025; Report on the State of Forests in Poland 2024.

Where Does Polish Timber Actually Go?

EXPORTS

Raw timber exports (CN 4403), 2016–2025 thousand tonnes



FACT / ANALYSIS

2.5×

MORE TO GERMANY

In 2016–2025, about 12.9 million t of raw timber went to Germany and 5.2 million t to China.

Unlabelled points are plotted from the source chart and are approximate.

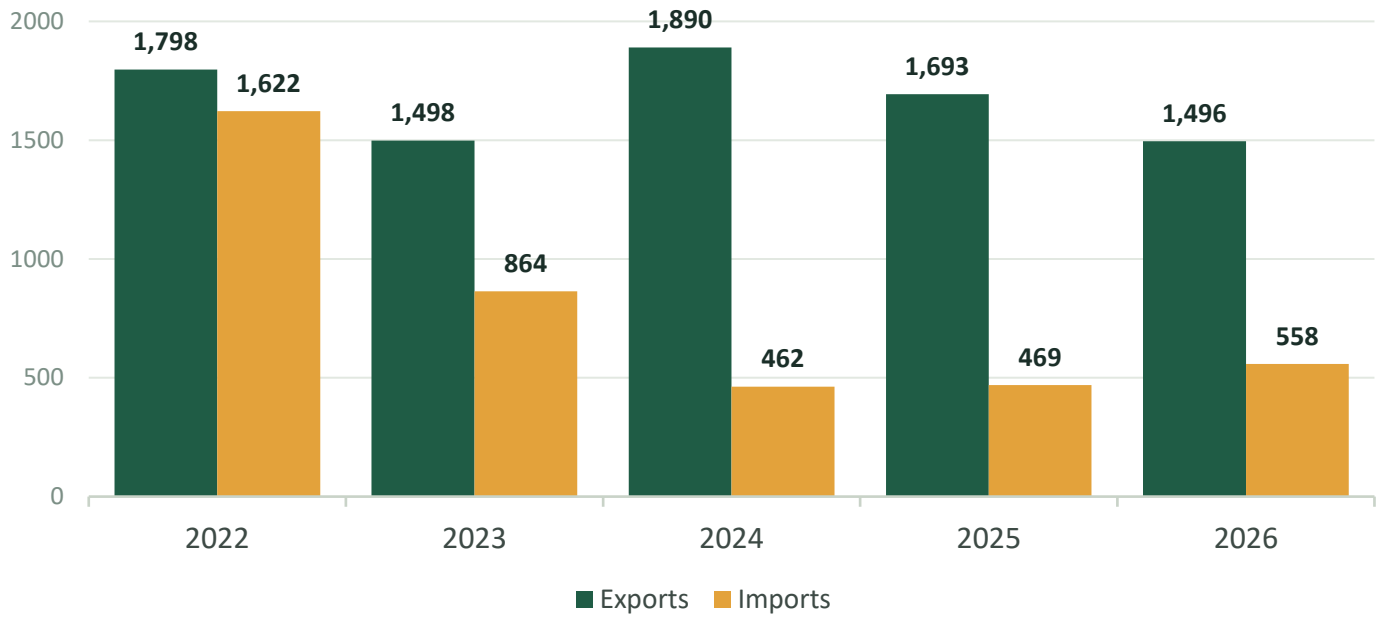
China peaked once, in 2020. In every other year, Germany took more Polish timber than China.

Source: GUS (Statistics Poland), dbw.stat.gov.pl.

The Real Problem: Imports No Longer Offset Exports

TRADE BALANCE

Raw timber (CN 4403), January–August of each year thousand tonnes



FACT / ANALYSIS

−66%

IMPORTS, 2022 → 2026

Exports fell by 17%, imports by 66%. The export surplus grew from 176 to 938 thousand t.

Same period each year: January to August.

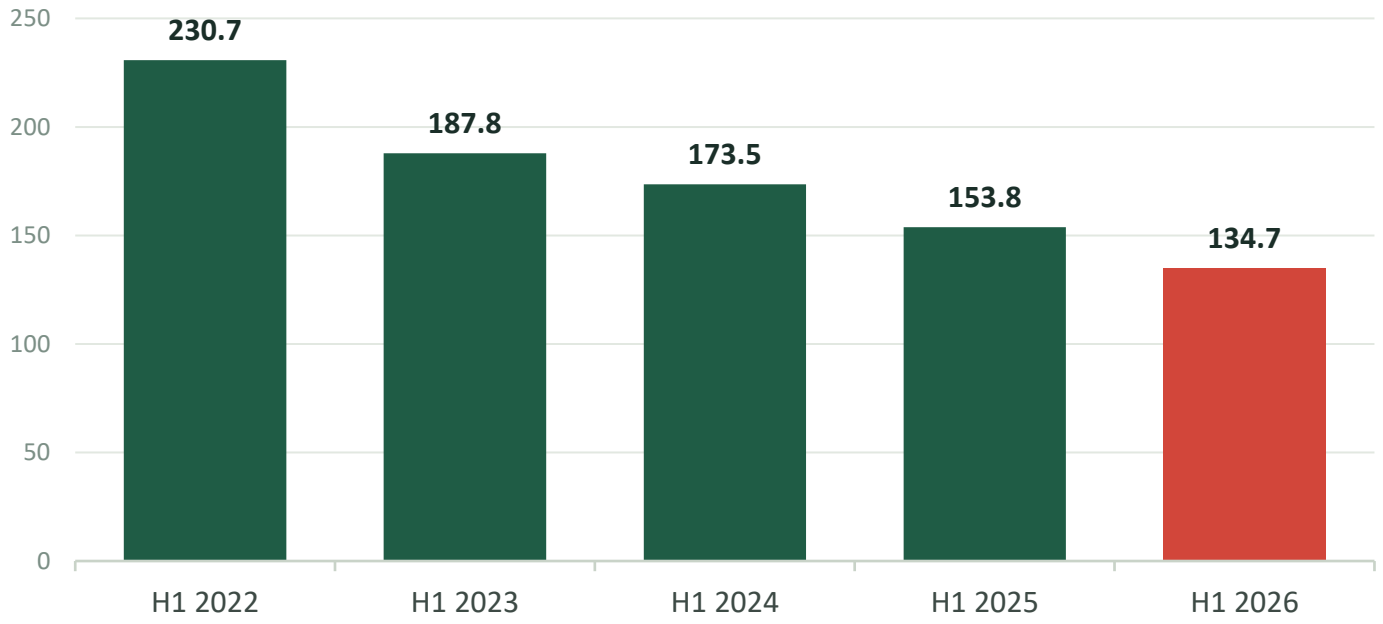
Imports fell far faster than exports: the surplus is now more than five times larger.

Source: GUS (Statistics Poland), dbw.stat.gov.pl.

Oak Sawlog Sales (W0 DB) Are Falling Sharply

OAK

Sales of oak sawlogs (W0 DB), first half of each year thousand m³



FACT / ANALYSIS

134.7 thousand m³

H1 2026

41.6% less than in the first half of 2022, and 28.3% less than in the first half of 2023.

Sales have fallen in every first half-year since 2022.

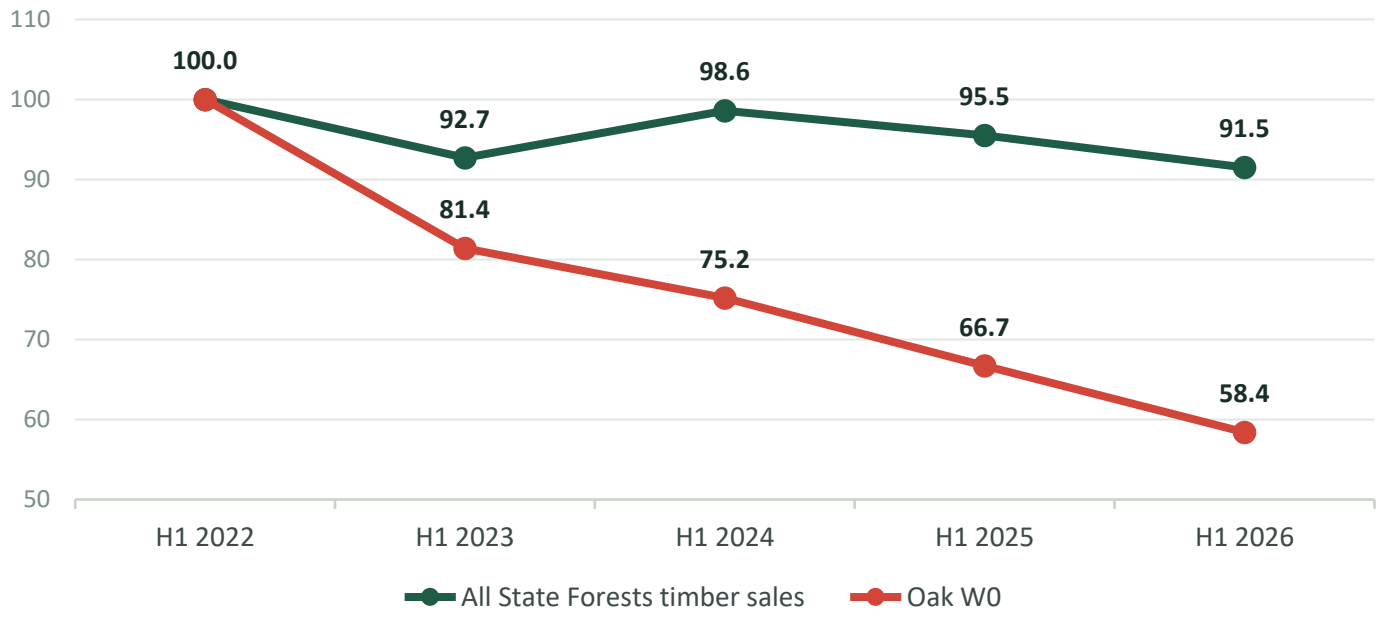
A concrete case of shrinking access to a raw material that parts of the wood industry depend on.

Source: DGLP, "Information on timber sales in PGL LP in 2022–2026 Q2", p. 37; own calculations.

Oak W0 Sales Fall Far Faster Than Total Sales

OAK

Sales index, first half of each year H1 2022 = 100



FACT / ANALYSIS

−41.6%

OAK W0 vs −8.5% OVERALL

Total timber sales in H1 2026 were 8.5% below H1 2022. Oak W0 sales fell almost five times as much.

The LP report does not show the full structure of oak assortments and quality classes.

Totals hide the shortage: species, assortment and quality decide what industry can buy.

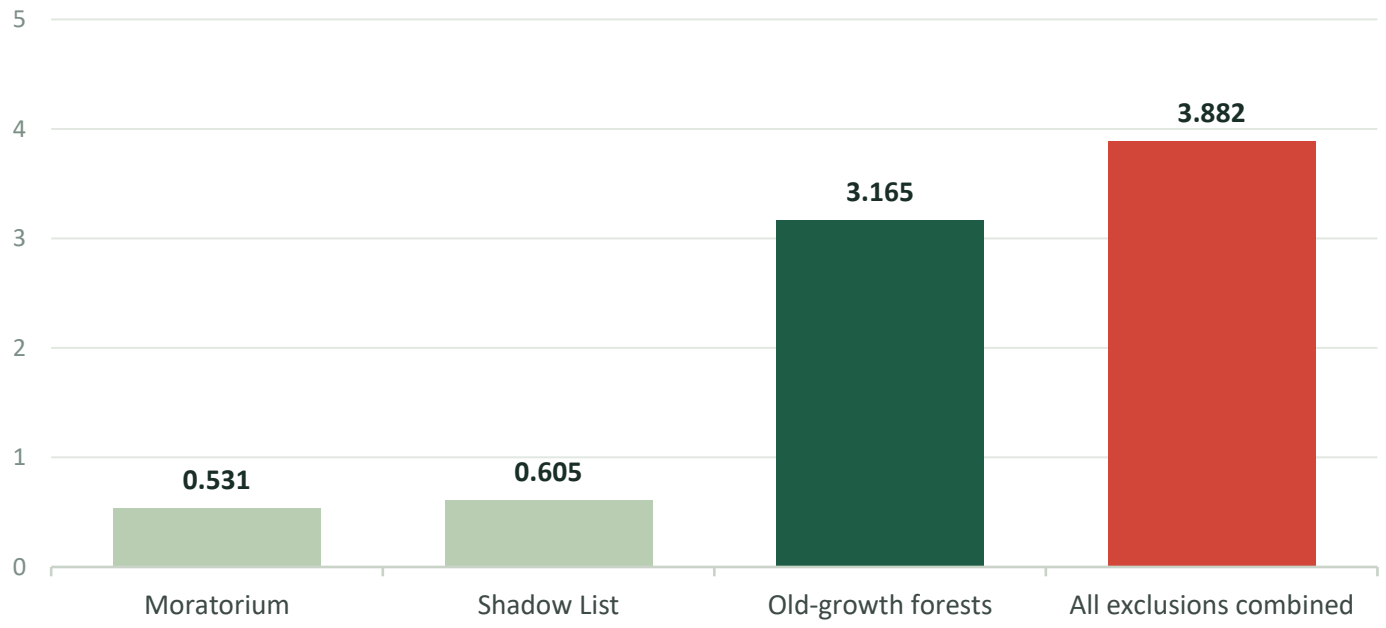
Source: DGLP, "Information on timber sales in PGL LP in 2022–2026 Q2", pp. 2 and 37; own calculations.

They Commissioned a Study. Here Is the Bill

SOCHA REPORT

Annual loss of supply, by exclusion type

million m³ per year



FACT / ANALYSIS

3.882 million m³

PER YEAR

Modelled loss in the scenario of combined exclusions, before any compensation.

Neither a loss already incurred nor a forecast of the final scope of the 20%.

A “not the position of Ministry of Climate” disclaimer does not refute the calculation.

Source: Expert study, University of Agriculture in Kraków, 28.11.2025, table 2, p. 36. Model results.

Is That a Lot?

Can We Afford It?

3.882 million m³

of timber supply lost per year, with all exclusions combined

PLN 1.012 bn

of State Forests revenue lost per year, before compensation

Source: Socha study, table 2, p. 36, and annex 5. Model results.

The Wood Industry in Poland: What Is at Stake

ECONOMY

409k
direct jobs

9%
of national exports

8.9%
of national industrial output

10.3%
of manufacturing output

7th
furniture producer in the world

4th
furniture exporter in the world

FOREST RESOURCE

1.922 bn m³

CURRENT GROWING STOCK

From 1956 to 2022, Poland harvested 1.954 bn m³ of gross large timber in total: 101.7% of today's growing stock.

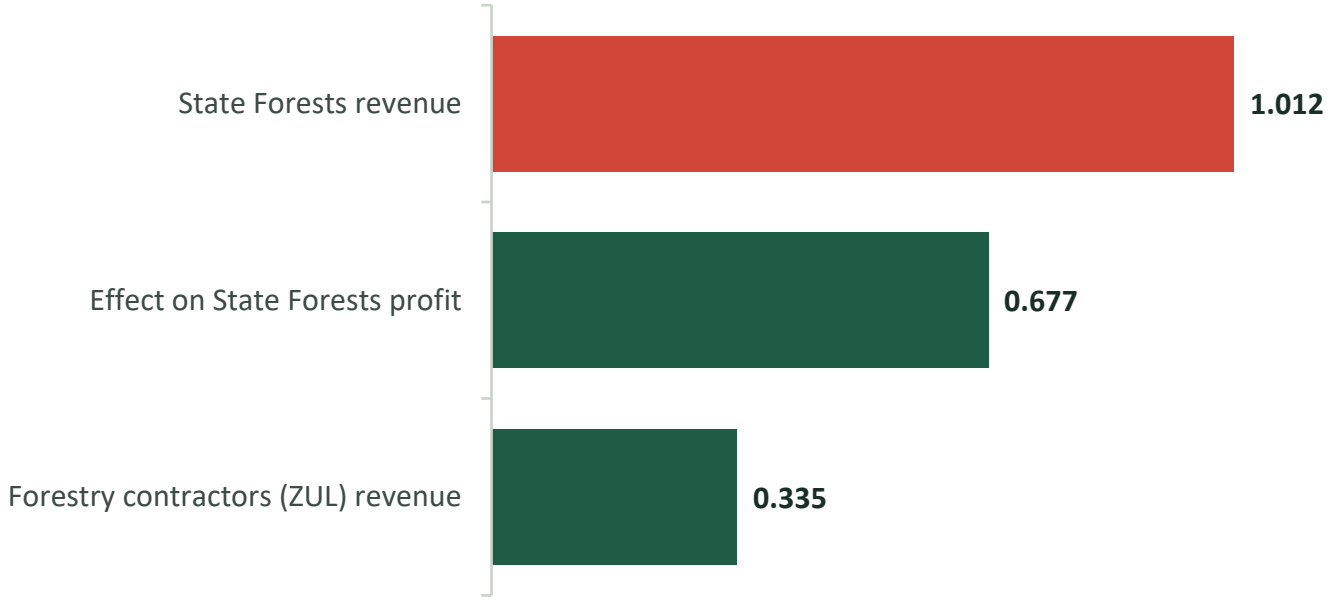
Since 1956 Poland has harvested more than today's entire growing stock, and the forest is still here.

Source: Conference presentation, slide "Wood industry in Poland".

A Specific System Pays for the Exclusions

FINANCE

Modelled annual loss PLN billion per year



FACT / ANALYSIS

PLN 1.012 bn

IN REVENUE

Modelled loss of State Forests revenue in the combined variant, before compensation: a risk to forestry services and the Forest Fund.

The loss of profit and of ZUL revenue are not extra amounts to be added up.

The Forest Fund will not conjure a margin out of ministerial optimism.

Source: Socha study, annex 5, cols. G–I; modelled measures.

A Furniture Icon Files for Bankruptcy

Fameg, Radomsko: bentwood furniture since 1881

1881

Bentwood furniture production begins in Radomsko (Thonet brothers).

MARCH 2025

The court approves an arrangement to repay creditors in instalments.

29 SEPT 2026

Fameg files a bankruptcy petition. The company says the plant is still operating.

"An icon of Polish furniture-making […] has filed for bankruptcy. Is this the end of a firm that has made bentwood furniture since 1881?"

CASE STUDY

518

EMPLOYEES AT END OF 2024

Fameg is one of the best-known names in Polish furniture-making, a symbol of bentwood chairs.

Down from 587 a year earlier. A petition does not automatically mean the plant closes.

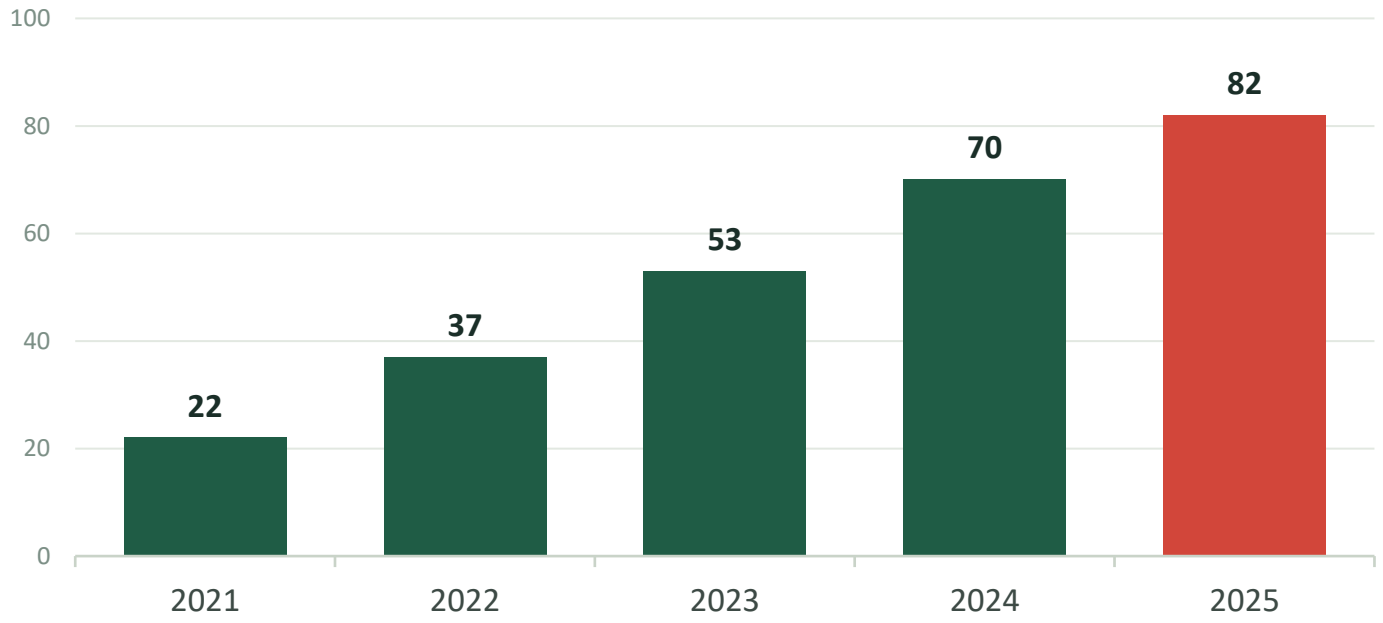
Behind every cubic metre of timber are firms, history and jobs.

Source: Fameg, news report of 12.10.2026; Fashion Biznes, 9.10.2026.

Furniture Industry: Bankruptcies Rise Every Year

EFFECTS ON INDUSTRY

Bankruptcies in furniture production per year



FACT / ANALYSIS

82

BANKRUPTCIES IN 2025

Almost four times as many as in 2021 (22). The number has risen every year since.

Wood-products makers: 85 bankruptcies in 2024 and 117 in 2025.

Bankruptcies in furniture-making have nearly quadrupled in four years.

Source: Coface, cited in Rzeczpospolita, 23.06.2026 and 9.09.2026.

Main Causes of the Bankruptcies

EFFECTS ON INDUSTRY

Less raw material, at high prices

State Forests have been cutting the pool of timber offered to industry: 37 million m³ in 2026, down from 38. Hardwood supply, oak above all, has nearly halved in a few years.

Lost competitiveness abroad

A strong złoty and rising labour and energy costs: Polish products lose on price to cheaper Chinese competition and to metal and composite alternatives.

Knock-on effects across the sector

Falling profitability at sawmills and wood-component makers hits furniture producers: payment backlogs and a debt spiral. Unpaid debts: PLN 352 m (KRD).

SUPPLY GAP

41 vs 37

MILLION m³: NEED vs 2026 POOL

The wood industry says it needs about 41 million m³ of timber a year to run stably. The 2026 pool offered for sale is 37 million m³.

Industry estimate: Polish Chamber of Commerce of the Wood Industry (PIGPD).

Raw material comes first: no industry can process timber that is not offered.

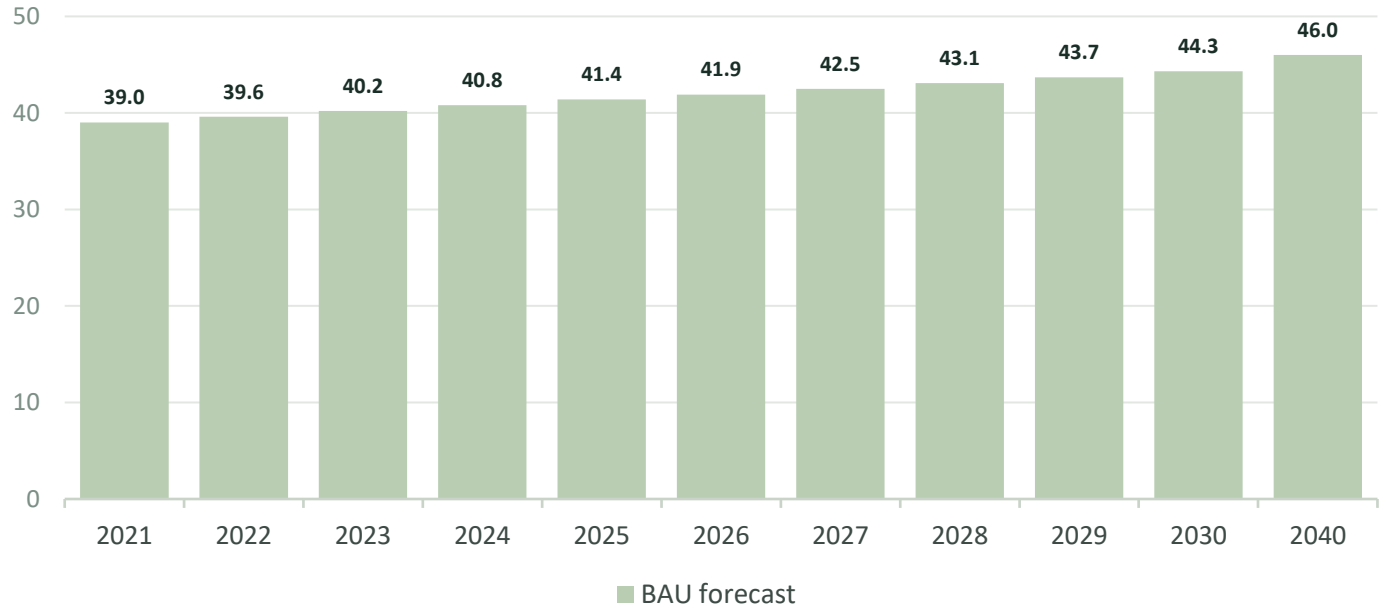
Source: Rzeczpospolita, 23.06.2026 (Coface, KRD); Farmer.pl, 27.05.2026 (PIGPD); Drewno.pl; Money.pl.

Business as Usual: The Harvest Path That Was Expected

SCENARIOS

Annual harvest in PGL LP: BAU forecast vs recorded

million m³, net large timber



FACT / ANALYSIS

44.3 million m³

BAU FORECAST FOR 2030

Under existing practice, harvest was forecast to rise every year, reaching 46.0 million m³ by 2040.

Recorded harvest: State Forests data; 2025 incomplete (over 36.27 million m³).

Since 2023, recorded harvest has run below the business-as-usual path.

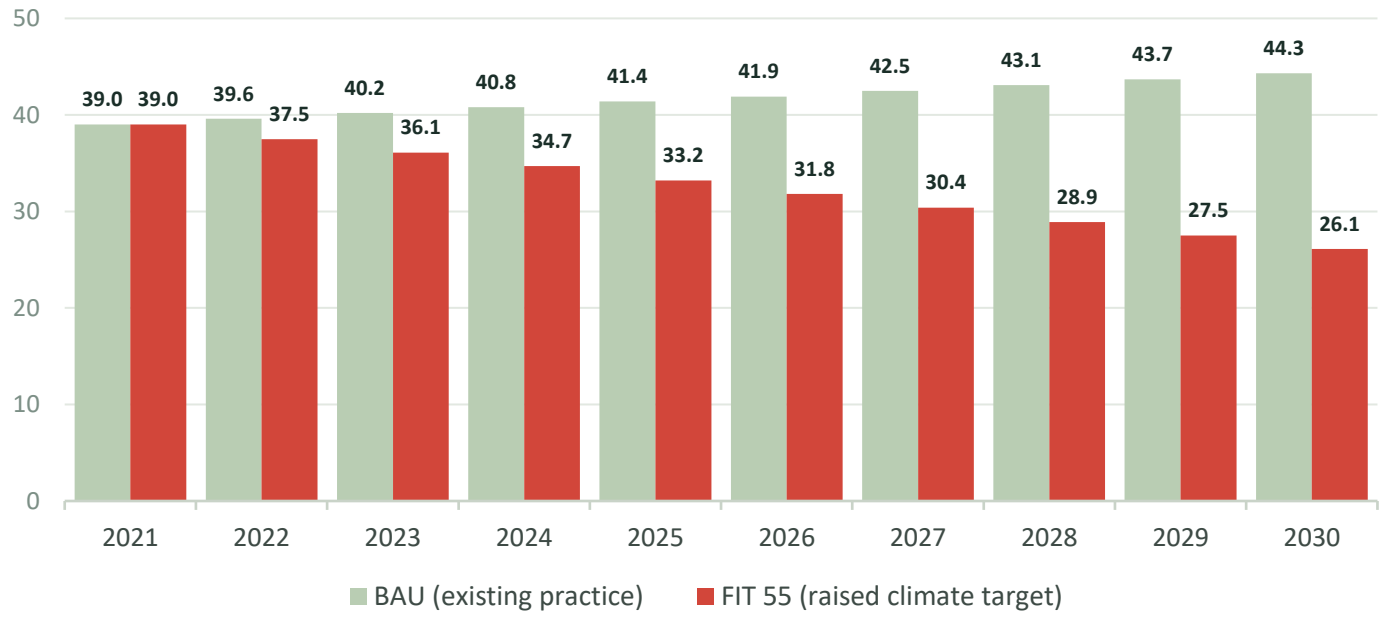
Source: Forecast of annual harvest in PGL LP, BAU scenario (conference presentation); State Forests data.

Could, but Should Not: The FIT 55 Harvest Scenario

SCENARIOS

Annual harvest in PGL LP: FIT 55 vs BAU, 2021–2030

million m³, net large timber



FACT / ANALYSIS

59%

OF BAU HARVEST IN 2030

Under FIT 55, harvest in 2030 would be 26.1 million m³, against 44.3 million m³ under business as usual.

A scenario forecast, not an adopted plan.

FIT 55 would mean about 18 million m³ less timber a year by 2030.

Source: Forecast of annual harvest in PGL LP, FIT 55 and BAU scenarios (conference presentation).

Not Every Cubic Metre Is Equal

ASSORTMENT

BACKUP

Large-size timber (assortment W): share of the modelled loss percent



FOR DISCUSSION

71.3%

OF REVENUE

Large-size timber accounts for a bigger share of the lost value than of the lost volume.

A model, not an audited fall in revenue.

Quantity does not automatically restore value.

Source: Socha study, table 2, p. 36.

PKE80 / DEMANDS TO THE MINISTRY AND THE SEJM

Show Us the Numbers.

1. FMP: approved allowable cut, execution and balance
2. Every version of the harvest plans, with the history of amendments
3. A balance of exclusions after removing overlapping areas
4. Compensation by species, assortment, RDLP and timing
5. A public matrix of how expert studies were used in the NFP

I am not demanding a moratorium on nature protection. I am demanding an end to management without a disclosed account.



POLISH ECOLOGICAL CLUB 80 • FOREST POLICY SECTION

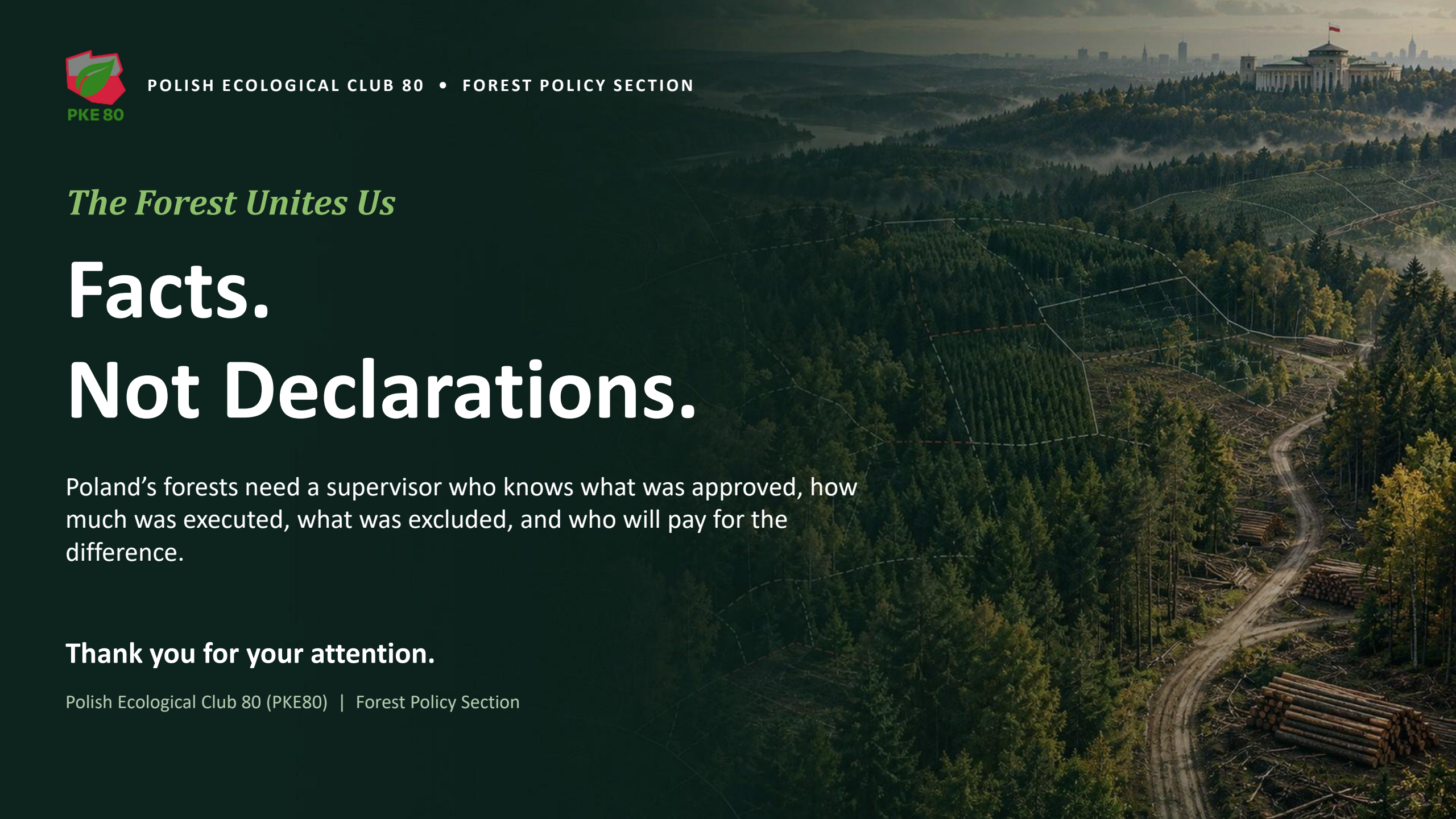
The Forest Unites Us

Facts.
Not Declarations.

Poland’s forests need a supervisor who knows what was approved, how much was executed, what was excluded, and who will pay for the difference.

Thank you for your attention.

Polish Ecological Club 80 (PKE80) | Forest Policy Section



Abbreviations Used in This Presentation

GLOSSARY

BAU	Business as usual: harvest under existing practice
CN 4403	Customs code for raw wood (logs)
DGLP	Directorate-General of the State Forests
FIT 55	EU climate package: emissions −55% by 2030
FMP (PUL)	Forest Management Plan: 10-year plan per district
GUS	Statistics Poland
H1	First half of the year
KRD	National Debt Register

LP (PGL LP)	State Forests (Lasy Państwowe)
MKiŚ	Ministry of Climate and Environment
NFP (NPL)	National Forest Programme
NIK	Supreme Audit Office
RDLP	Regional Directorate of the State Forests
TWP / TPP	Early / late positive thinning
W0 (DB)	Sawlog-grade large timber (DB = oak)
ZUL	Forestry service contractors

Polish abbreviations are kept in brackets where they appear in the documents cited.