

Potential impact of EU 2030 Biodiversity Strategy on forest-based sector in Poland¹

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Sustainable management of natural resources – a basic condition for successful socio-economic development in the period of implementation of the new environmental policy of the European Union

¹Based on: Analiza wpływu ograniczenia pozyskania drewna w Lasach Państwowych na przemysł drzewny (Impact of limited timber harvesting in the State Forests on wood sector in Poland, 2021. General Directorate of the State Forests, Warszawa.



Poland  State Forests

The new EU-wide Biodiversity Strategy will:

➤ Establish protected areas for at least:



30%
of land in
Europe



30%
of sea in
Europe

With stricter protection of remaining EU primary and old-growth forests legally binding nature restoration targets in 2021.

areas are strictly protected in the EU. We need to do better to protect these areas. In this spirit, at least one third of protected areas – representing **10% of EU land and 10% of EU sea – should be strictly protected**. This is also in line with the proposed global ambition.

what does it mean
for
forestry in Poland?

Direct impact

Impact of limited timber harvesting
on timber supply

scenarios

timber	harvested and sold in 2019	-10%	-20%	-40%
mln m3				
pulp wood	23,1	23,1	23,1	13,8
sawmill timber	15,9	14,3	12,7	9,6
total	39,0	37,4	35,8	23,4

direct market reaction:

rise in timber prices
lower supply of wood products

Consequences

Impact on
business?

- 4921 enterprises



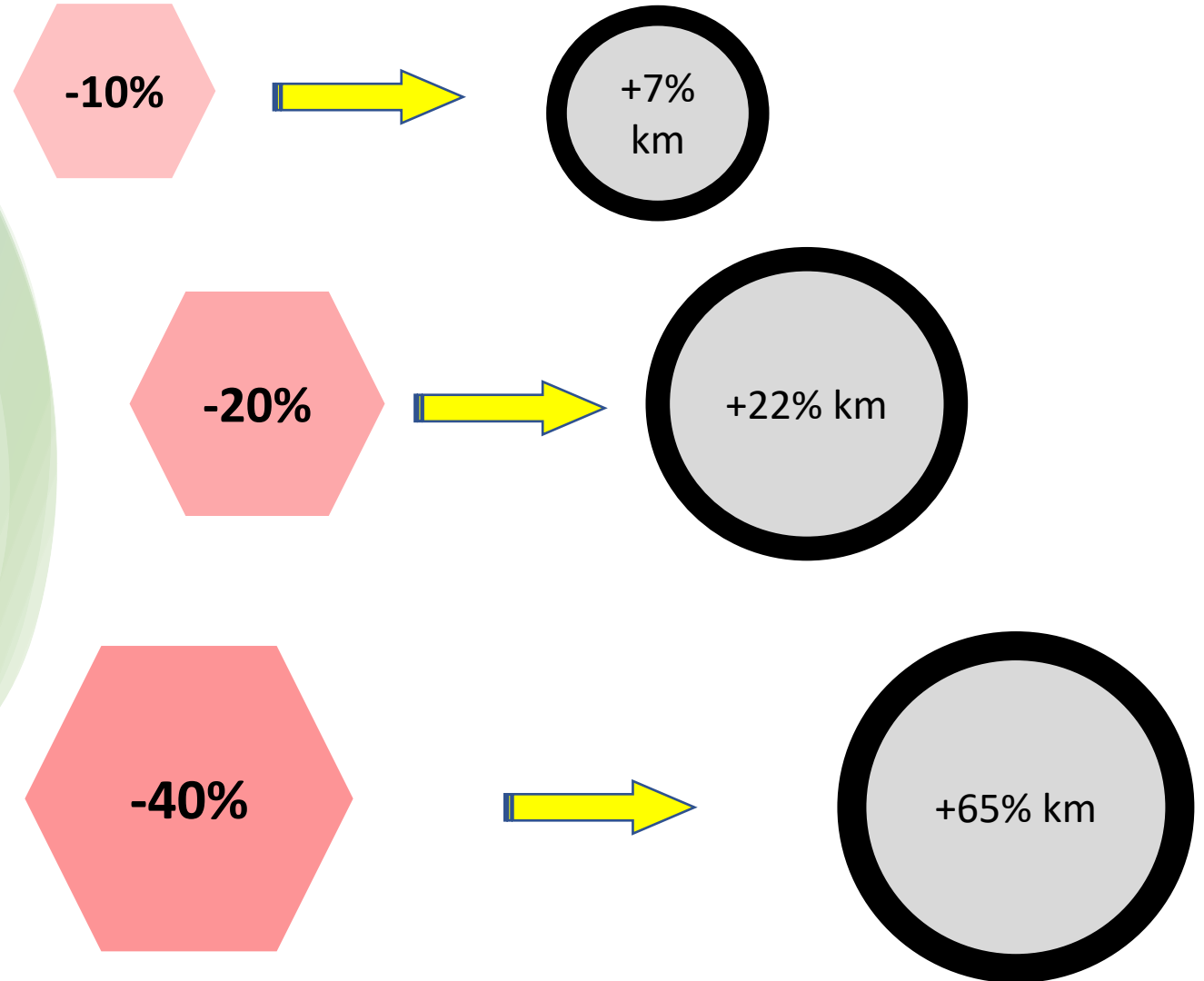
- In Poland: 6 956 timber industry enterprises (but 7 266 industry plants)
- 93% micro (up to 1 000 m³) and small (1 000 to 10 000 m³) enterprises
- all take and need 27% of supplied timber
- drop in timber supply by 40% = closing 90% of timber enterprises (**SME**)

Biodiversity and ecological issues

Increase of area radius (supply radius)
due to limited timber supply

What's next?
timber transport

more km! ... more ?

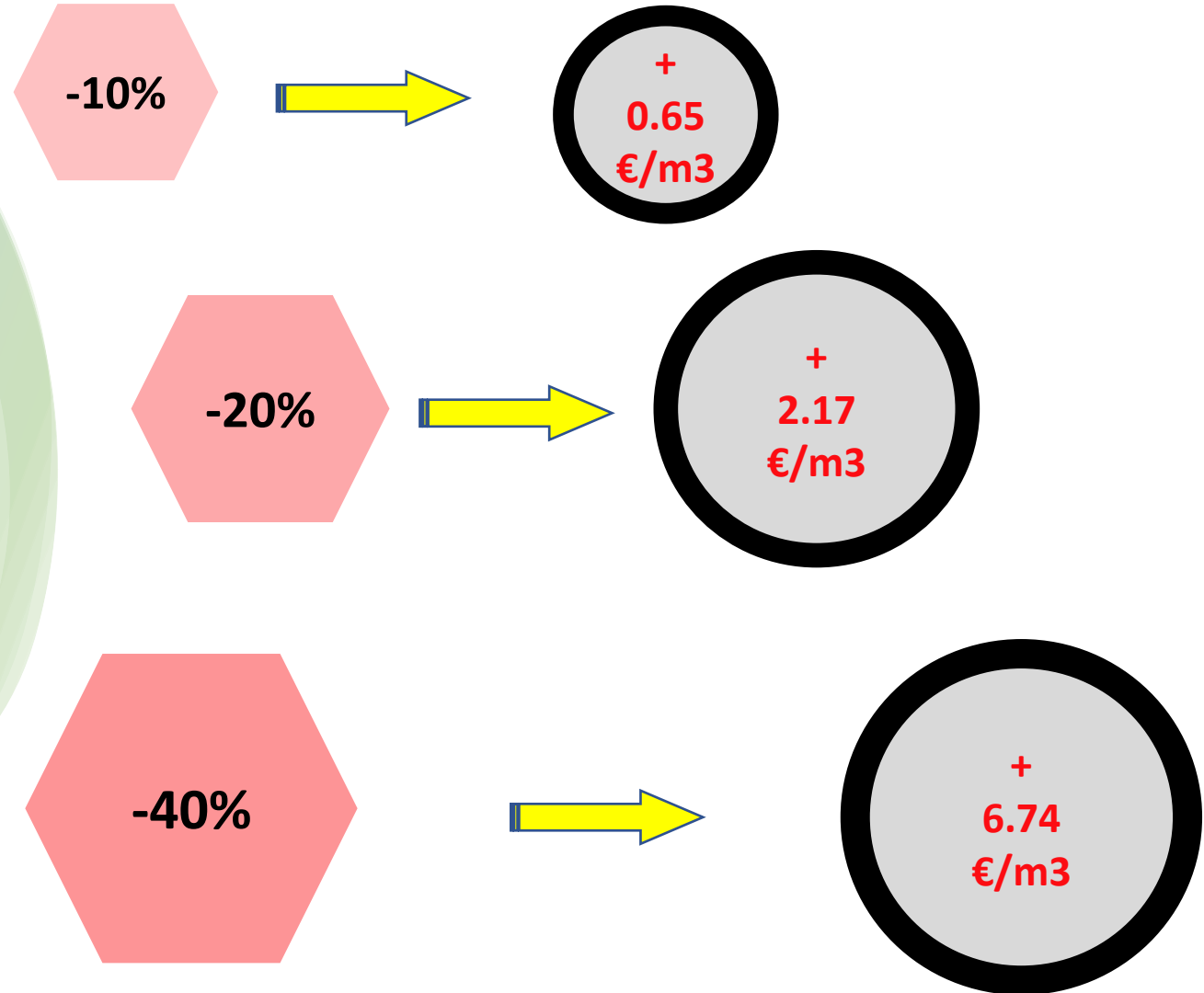


Let's talk about money

Rise of transport costs

What's next?
longer transport

more costs !!! €/m³



Let's talk about money in:



What's next?



Reduced
income



Poland  State Forests

drop of income by up to 30%
=
€ 543 mln

200 000 employees losing jobs in
timber industry

= impact on 1% of jobs

= drop in employment in industry
sector: from 12.5% to 6.0%

Other consequences:

in 2019: Polish export of furniture = € 11 200 mln

= 2nd biggest export in the World, China in front

closing down 90% of
enterprises **in rural areas**

(92% of companies employ less
than 10 people)

Polish timber sector will lose
its position in Europe



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