



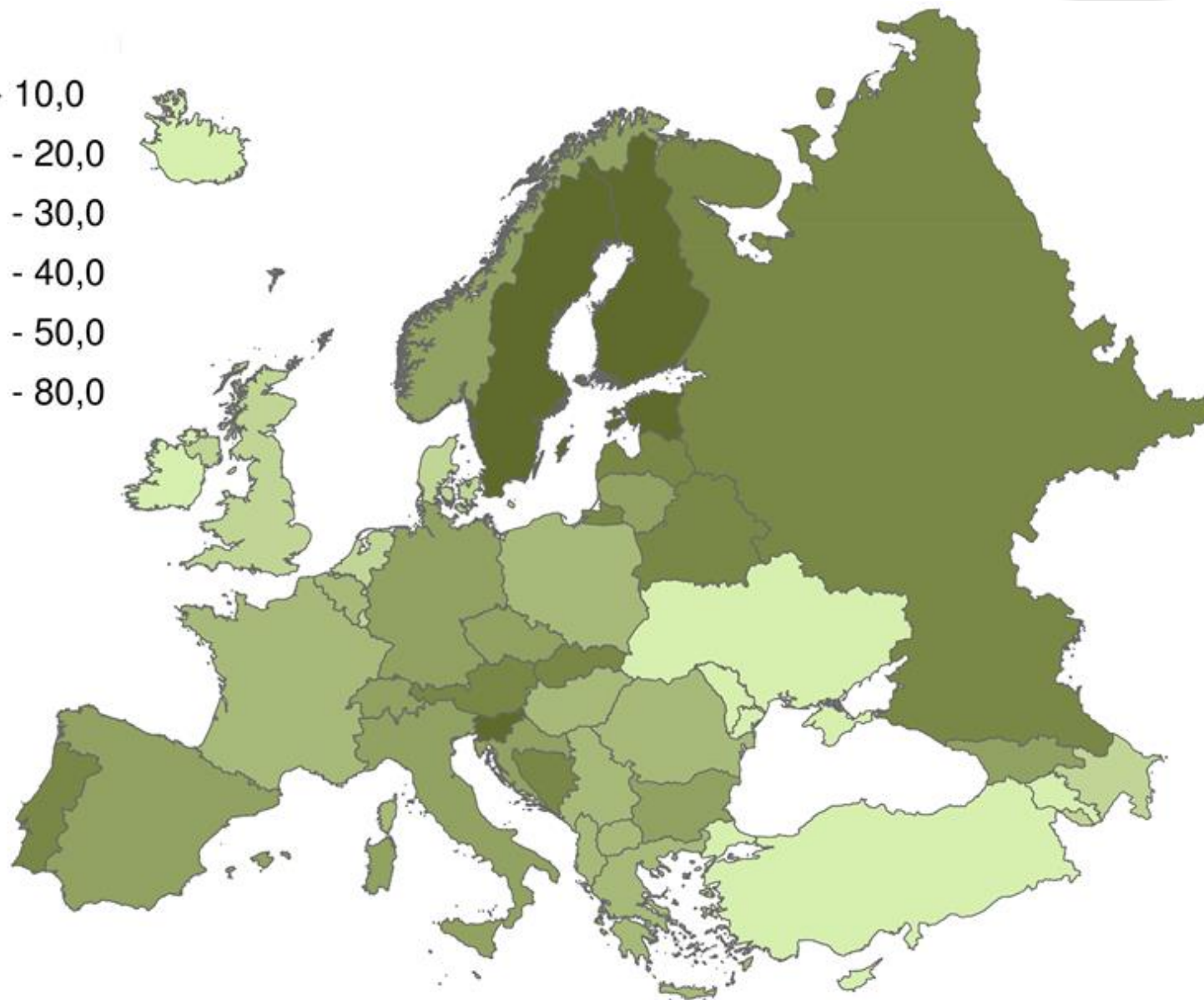
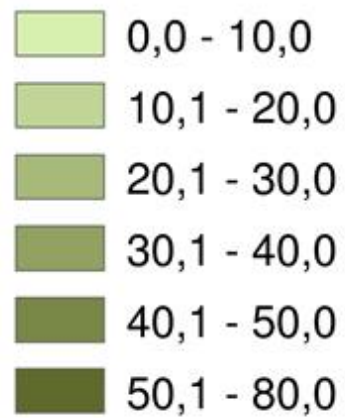
# **Private forestry contractors in Poland - current state and development opportunities**

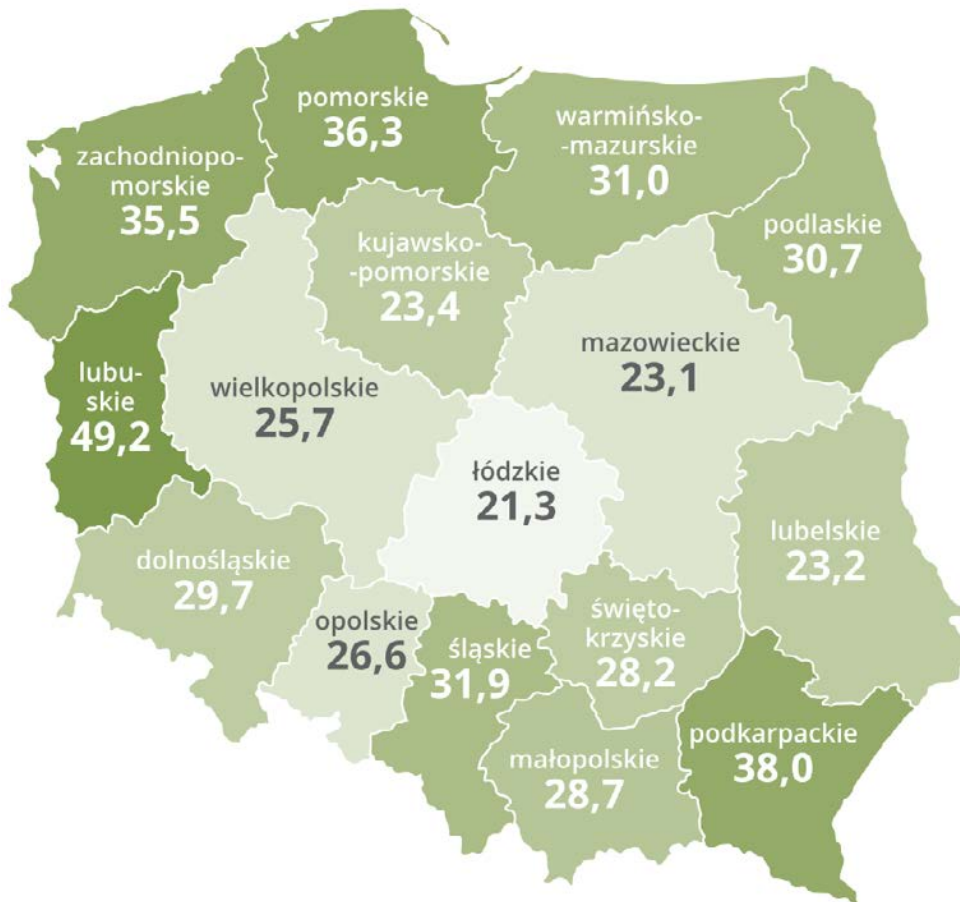
Janusz Kocel, Krzysztof Jodłowski

Department of Forest Resources  
Management

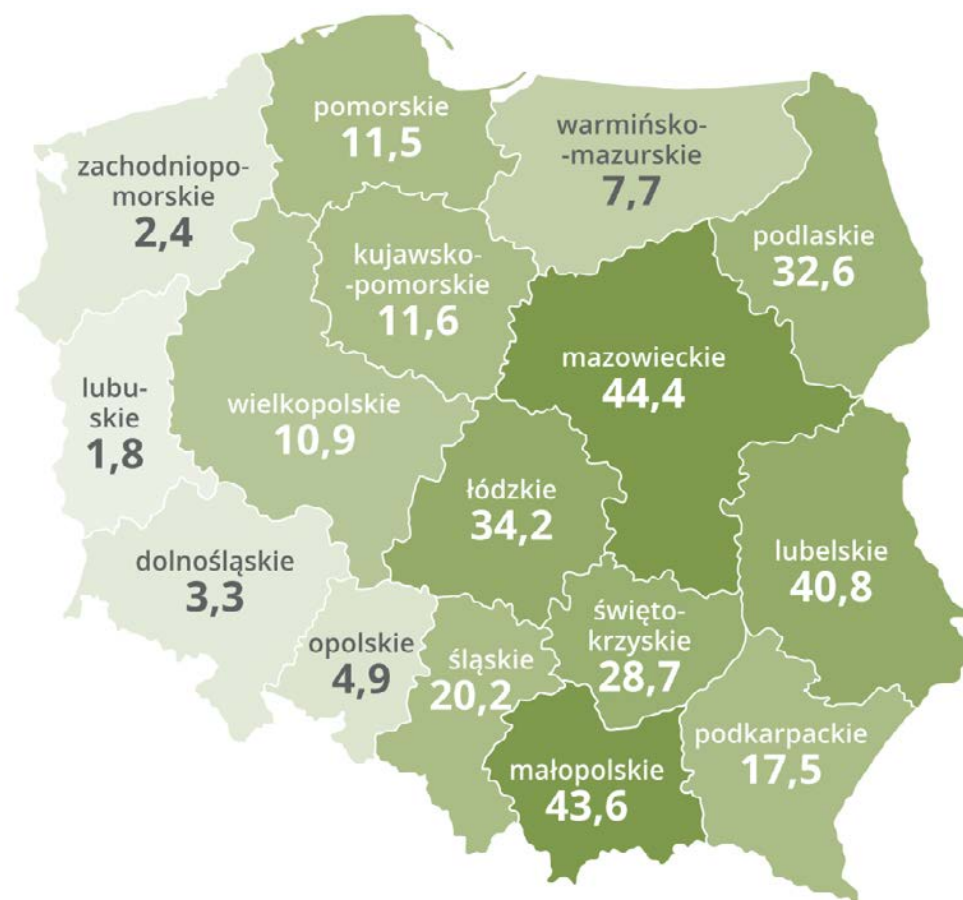
Forest Research Institute

- 1. Forest resources in Poland**
- 2. Characteristics of forestry contractors**
- 3. Basic condition of functioning of forestry contractors**
- 4. Conclusions**



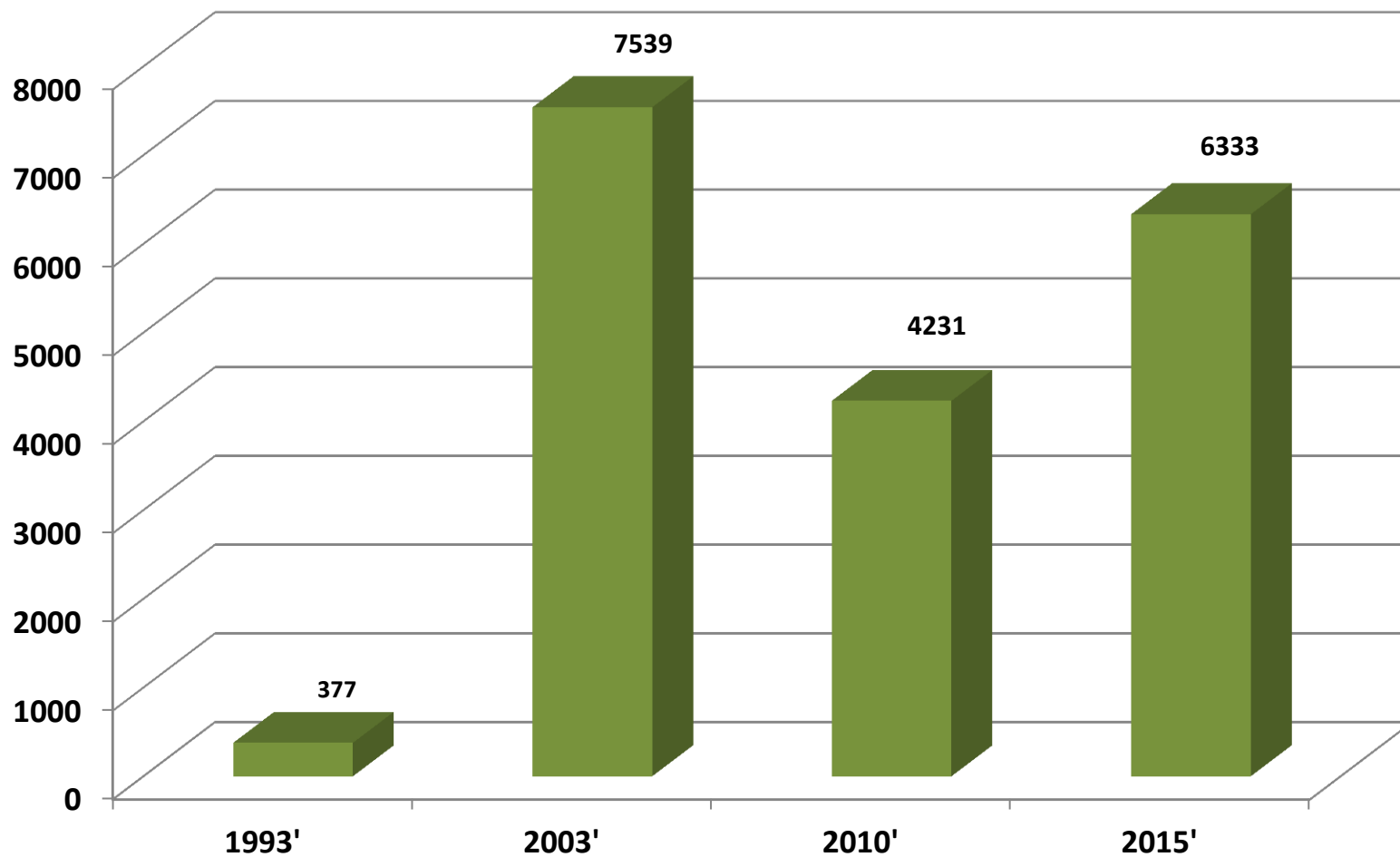


- 9.20 M ha
  - State Forests - 7.09 M ha
  - Private forests - 1.75 M ha
  - Others - 0.36 M ha
- Coniferus – 69.1 %
- Growing stock
  - State Forests: 275 m<sup>3</sup>/ha
  - Private forest : 232 m<sup>3</sup>/ha



- Number of owners:  
~900k
- Average private forest:  
1.2 ha

- Total - 39.7 M m<sup>3</sup>
  - 37.7 M m<sup>3</sup> – State Forests
  - 1.5 M m<sup>3</sup> – private
  - 0.5 M ha – others



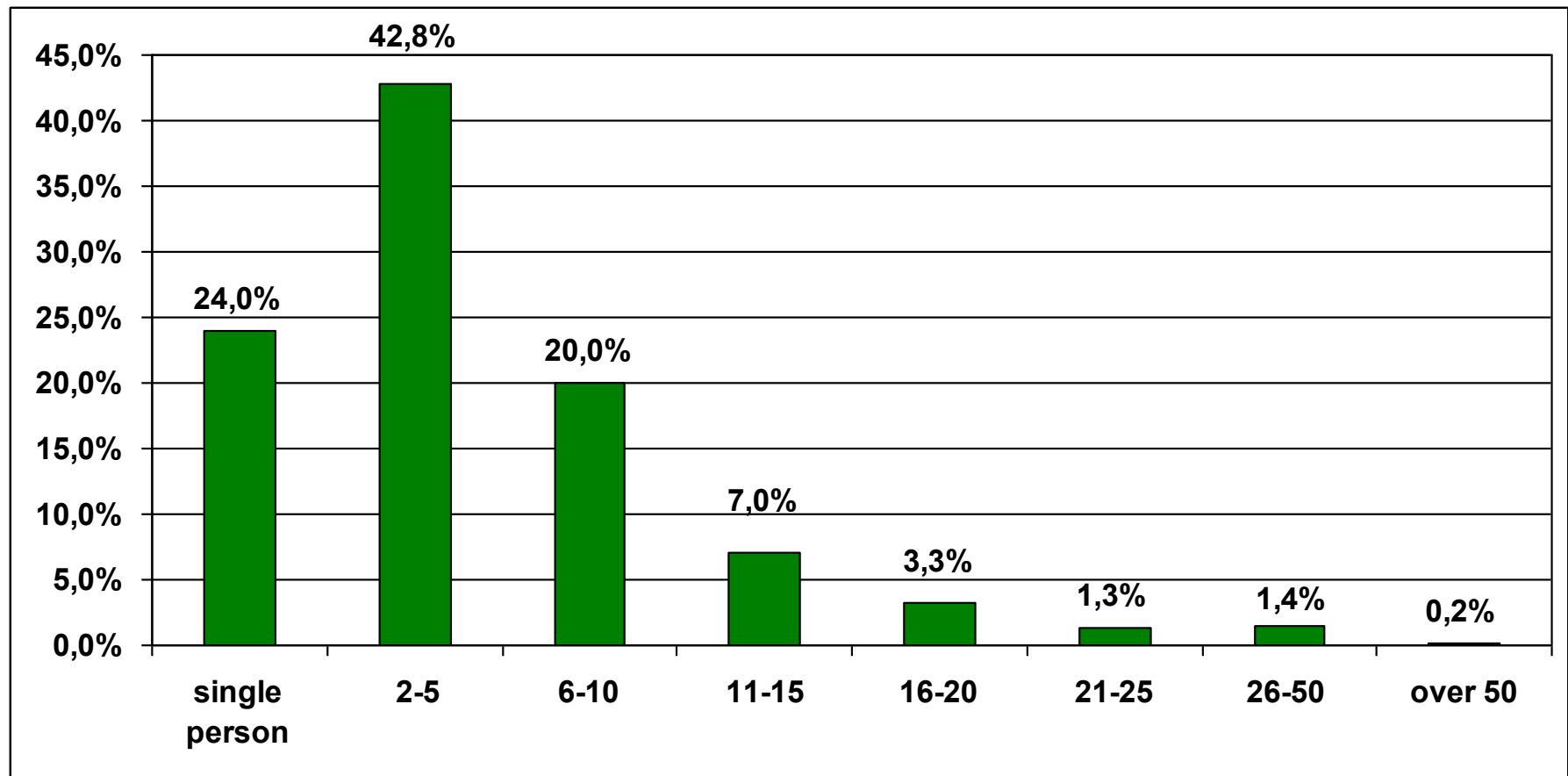
[Source: General Directorate of State Forests]

- ❑ Owned by natural persons – 90,9%
- ❑ Civil partnerships – 8.0% of *multi-persons*
- ❑ Registered partnership - 0.8% of *multi-persons*
- ❑ Limited liability company – 0.3% of *multi-persons*



**The total number of employees in forest companies in 2015 - 41351 people**

**Supervisors with forest education – 1 234 people**



[Source: General Directorate of State Forests]

**Over 20 years of existence**

**1990 - 1996 – dispersed (emerging) sector**

**1997- 2004 – „maturing” sector**

**2004 – today - having some characteristics  
of a global sector**

## Demographic and economic changes

- Ageing of population and extending the length of life, so in 20 years:
  - Population of Poland will decrease by 2 million;
  - Number of working-age population will decrease by 3.9 million;
- High labor costs → civil contracts;
- Lower wedges compared to wages in the corporate sector. In 2012 almost 40% lower.
- Low prestige of the forest worker.
- Forest education – lack of vocational schools

- Loss of professional competence among forest workers;
- Average age of forestry contractor is increasing;
- Knowledge of forestry contractors on instruments and institutions supporting entrepreneurship is very low;
- Lack of an institution grouping forestry contractors

**Competitiveness index of forest firms [%]** - the ratio of the number of tenders submitted by a forest companies and the number of work packages defined to tender by forest districts

<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>
<b>107,55</b>	<b>111,42</b>	<b>117,52</b>	<b>107,55</b>	<b>140,73</b>

## **The forestry contractor sector should:**

- Takes a multidirectional efforts to change the image and increase the attractiveness of work.
- Implements comprehensive solutions for continuous improvement of qualifications of forestry contractors, including changes in professional forest education.
- Seeks the support mainly in programs supporting the development of rural areas and small and medium-sized enterprises.

**Thank you!**

**Janusz Kocel [j.kocel@ibles.waw.pl](mailto:j.kocel@ibles.waw.pl)**

**Krzysztof Jodłowski [k.jodlowski@ibles.waw.pl](mailto:k.jodlowski@ibles.waw.pl)**