



Stowarzyszenie Papierników Polskich

Las2017- joint session of ECE Committee on Forests and Forest Industry and FAO European Forestry Commission

Polish market situation of wood products

**Andrzej Samborski
The Association of Polish Papermakers**

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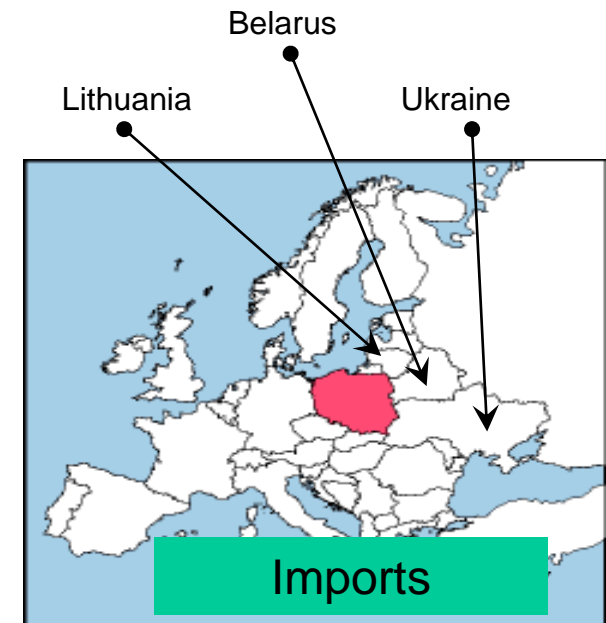
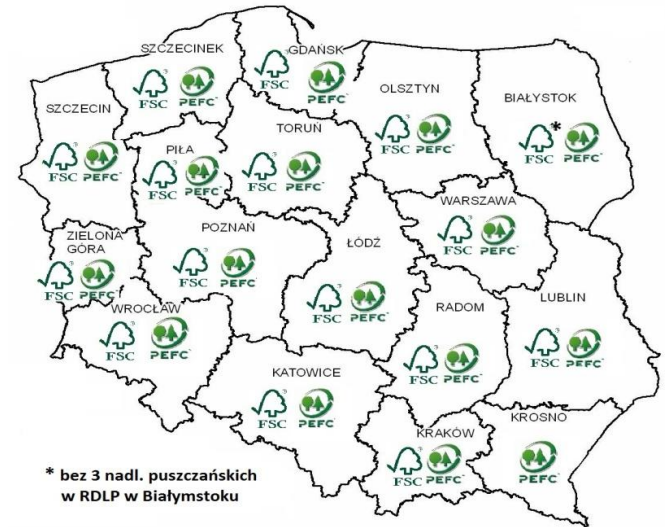
PL Wood Industry 2016

- Sold production 122B PLN (9% of entire industry)
 - Furniture sector 36%
 - Pulp and Paper 32%
 - Wood sector 32%
- Wood products export 70B (9%) and import 32B PLN (4%)
- Employment 330K (12%) and +4% y-o-y:
 - Furniture sector 50%
 - Wood sector 33%
 - Pulp and Paper 17%
- Wood Industry generates 12pIn added value of each 1pIn paid for wood



Wood sources

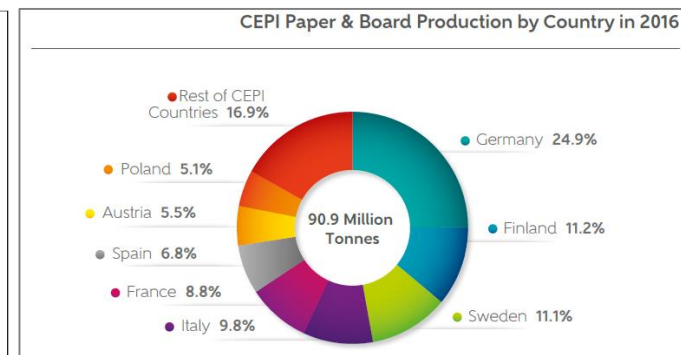
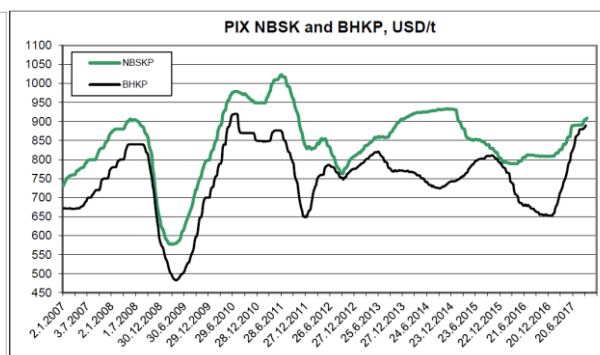
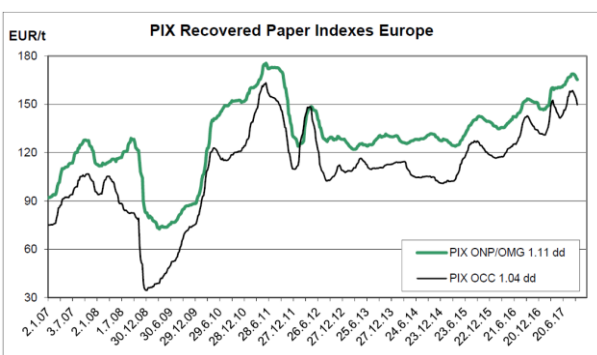
- PL State Forests
 - Stability and potential
 - FSC* and PEFC
- Private forests
 - Fragmented
 - Lack of certification
- Import from EE and Baltics
 - BLR limitation in spite of big potential
 - UKR limitation
- Lack of HW pulpwood: birch and aspen
- Needed out of forest HW production—plantations
- Hurricane in August



PL Pulp and Paper Sector

000 ton	Usage	Production	Export	Import
Pulp	1 990	1 140	190	1 040
Paper and board	5 160	4 640	3 850	4 370
RCP	2 410	2 680	750	480

- Annual consumption per capita 134kg (CEPI avg.163, DE 249)
- Production 39 B, Export 18B, Import 18,6B PLN
- Production +4% y-o-y
- Paper production structure:
 - Packaging 60%
 - Graphic 19%
 - Tissue 13%



Other Value Added Wood Products



	Production	Export	Import	
Builder's carpentry Bpln	7,7	4,4	0,4	windows, doors, flooring materials
Wooden packaging Bpln	2,1	1,6	0,2	pallets, crates, chests
Sawn softwood Mm3	4,4	0,7	0,6	
Sawn hardwood Mm3	0,6	0,1	0,3	
Wood based panels Mm3	10,4	3,2	3,4	particleboard, fibreboard

- In general, Production and Export rose in 2016
- Success in coming years depends on production cost (wood) and F/X €/PLN





RED II (Renewable Energy Directive) –

overall policy for production and promotion of RNE

(Targets of 20% of total energy from RNE by 2020, 27% by 2030; Sustainable biomass criteria)

EU ETS (European Union Emission Trading Scheme) –

emission trading system created to encourage emission-reducing investment

(CO₂ sequestration – possibility of covering forest carbon sequestration by EU ETS; Carbon leakage - risk of relocating of production of energy intensive sectors outside EU; Biomass definition)

LULUCF (Land Use, Land Use Change and Forestry directive) –

proposal to integrate greenhouse gas emissions and removals into 2030 climate framework

(Sustainable biomass criteria; Sustainable forest management; Forest as carbon sink)

Circular economy (Cascaded use of wood)



Strategy for Responsible Development

create conditions for the growth of PL citizens income by 2020/2030 through reindustrialization, innovation, support for small and medium enterprises, export, social cohesion, e-state, public finance and funds consumption efficiency.

For Wood sector: Eco-construction, Polish Furniture, Programme WoodINN, Competitive Design

State's Multiannual Financial Plan 2017-2020

including main structural reforms: pro-family (500+), the housing policy (Flat+), support for people who are not professionally active and sealing the tax system.

National Programme of Reforms (EU Europe 2020)

Government's medium term forecast by 2020.

Renewable Energy Act

support rules for RES electricity production, change in the auction system, which aims to promote technologies that produce energy in a stable and predictable way, new definitions of RES installations and bio-mass.

National Smart Specializations (KIS)

#4 Wood Sector's innovative technologies, processes and products

#19 Creative Smart Technologies – furniture design