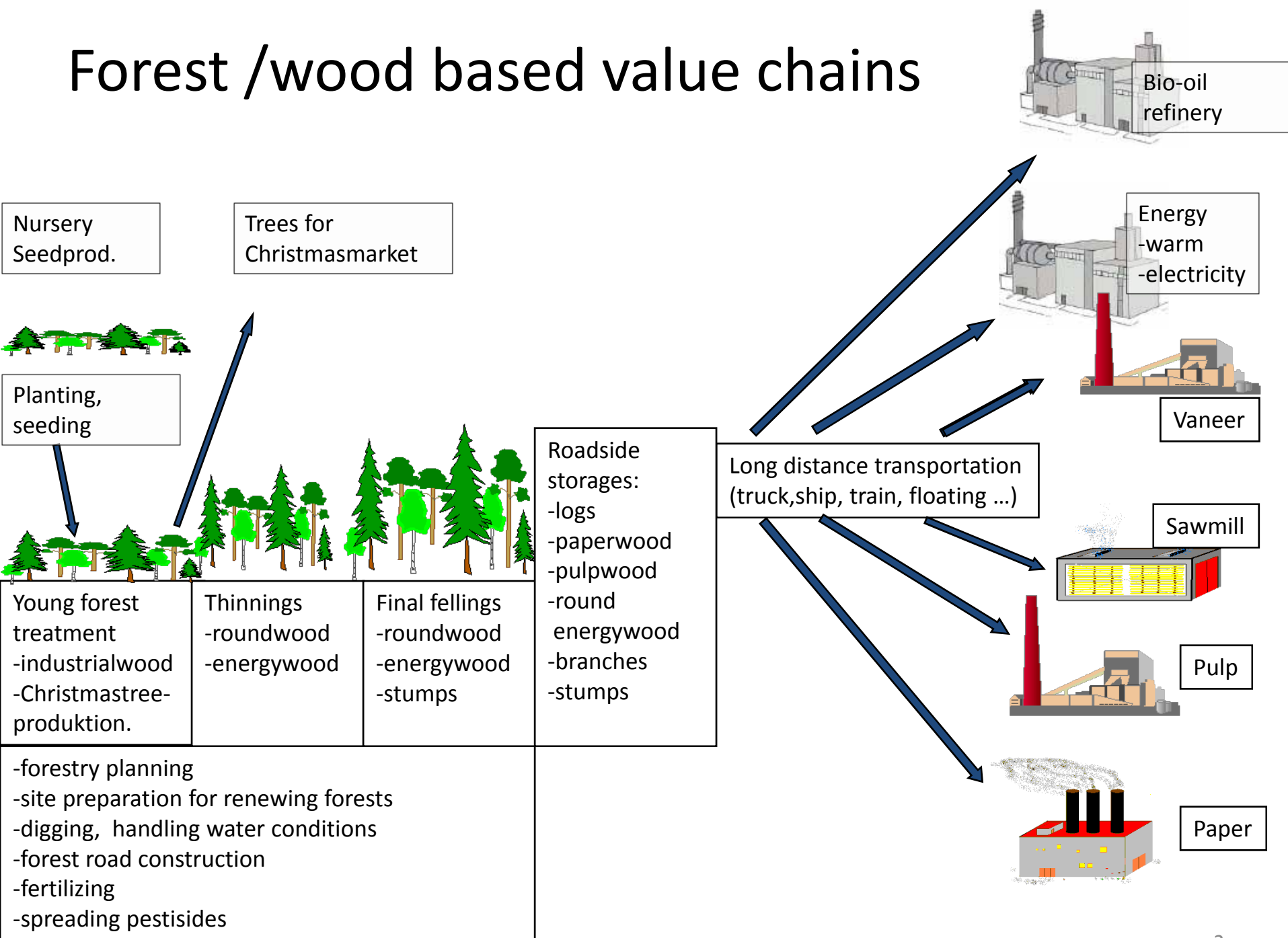




The Importance of Contractors in the Forest Based Value Chains Bruxells, 10.12.2008

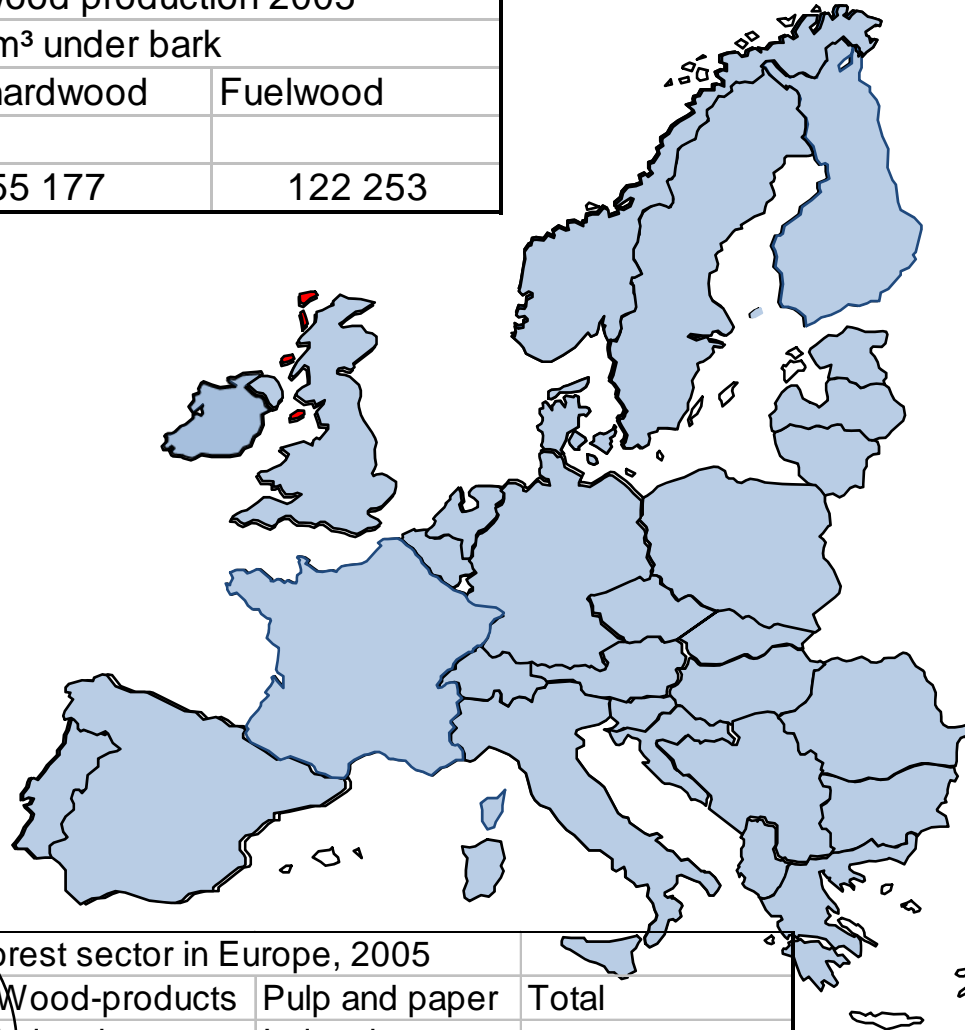
Mr. Simo Jaakkola, Vice Chairman
ENFE

Forest /wood based value chains



Forest based production in Europe

	Roundwood production 2005	
	* 1000 m ³ under bark	
	Soft & hardwood	Fuelwood
Europe	555 177	122 253



Value added of the forest sector in Europe, 2005			
Forestry	Wood-products industries	Pulp and paper Industries	Total
	milj. € – € million		
Europe	19 591	46 317	113 556

Roundwood production in Europe by countries

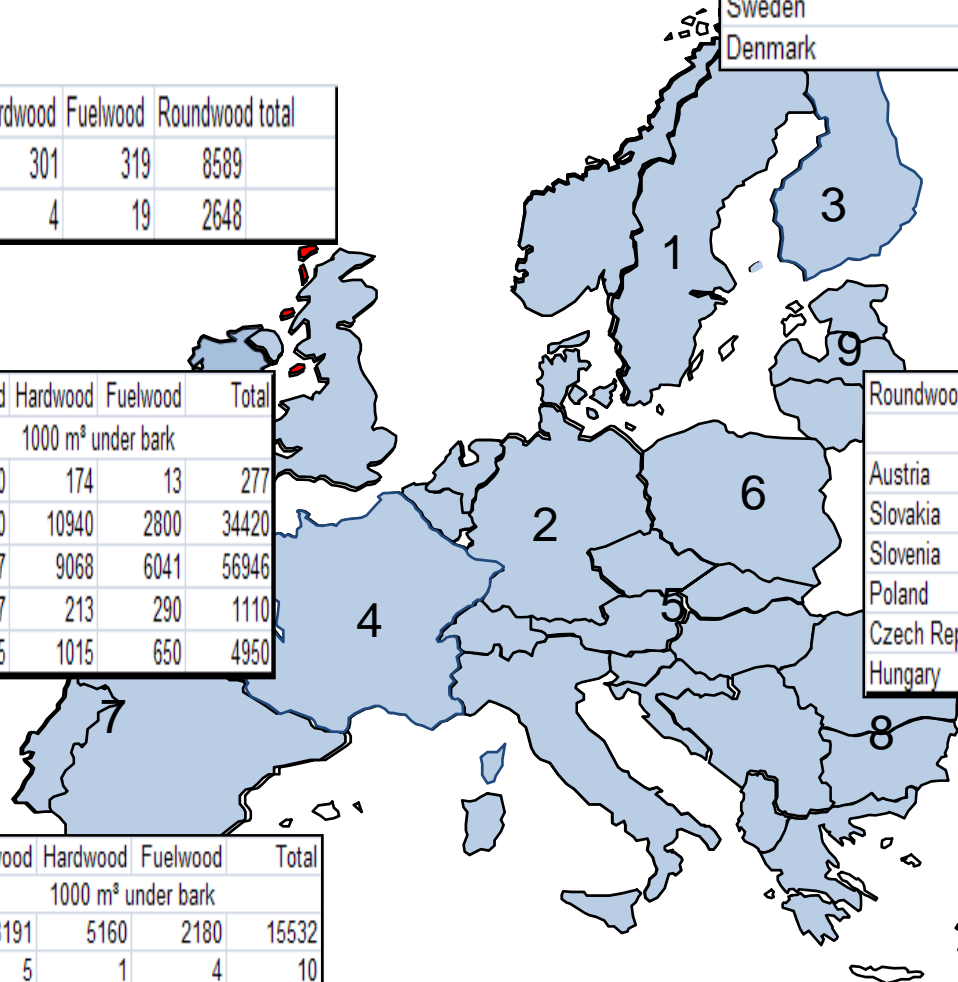
Roundwood production 2005	Softwood	Hardwood	Fuelwood	Total
1000 m ³ under bark				
Latvia	7935	3958	950	12843
Lithuania	2940	1975	1130	6045
Estonia	3800	1700	1300	6800
Finland	40928	6188	4483	51599
Sweden	87300	4400	7000	98700
Denmark	930	95	1260	2285

	Softwood	Hardwood	Fuelwood	Roundwood total
United Kingdom	7969	301	319	8589
Ireland	2625	4	19	2648

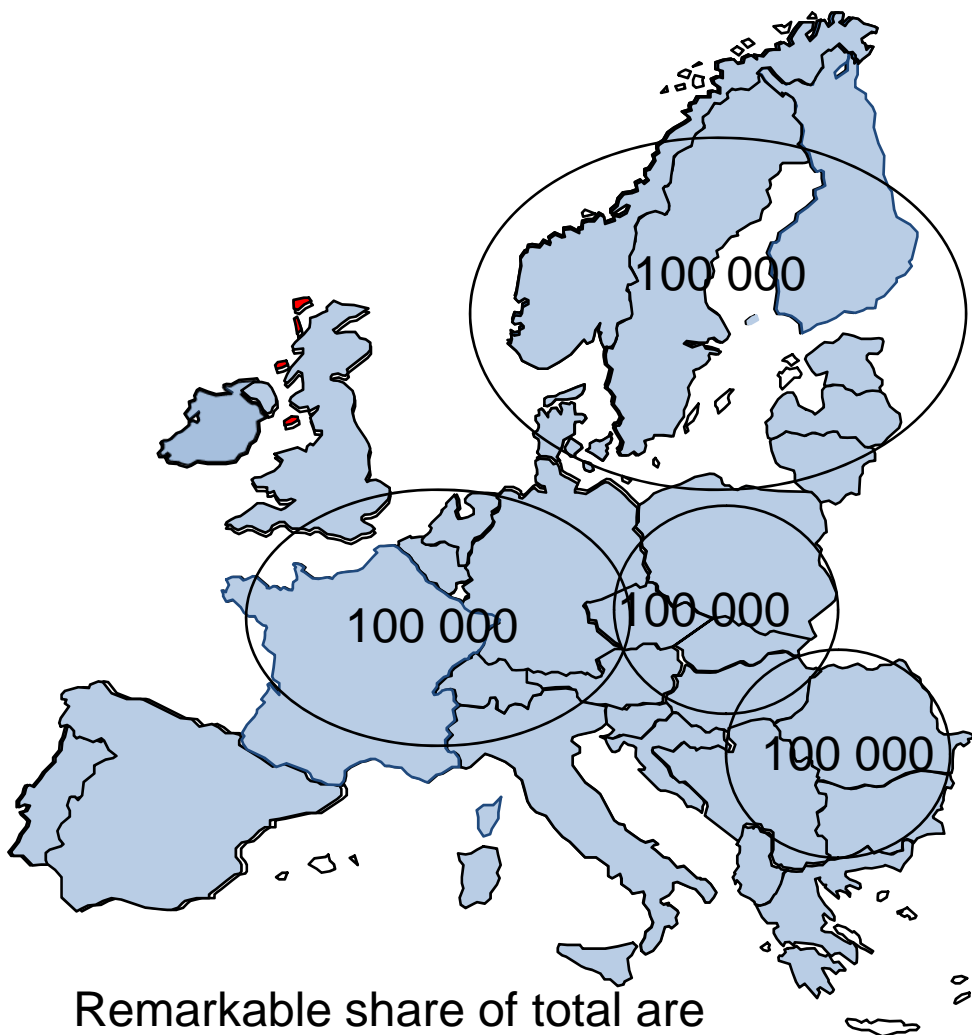
Roundwood production 2005	Softwood	Hardwood	Fuelwood	Total
1000 m ³ under bark				
Luxembourg	90	174	13	277
France	20680	10940	2800	34420
Germany	41837	9068	6041	56946
The Netherlands	607	213	290	1110
Belgium	3285	1015	650	4950

Roundwood production 2005	Softwood	Hardwood	Fuelwood	Total
1000 m ³ under bark				
Austria	11846	940	3685	16471
Slovakia	6077	2928	297	9302
Slovenia	1541	248	943	2733
Poland	21357	7174	3413	31944
Czech Republic	13163	1122	1225	15510
Hungary	683	2121	3136	5940

Roundwood production 2005	Softwood	Hardwood	Fuelwood	Total
1000 m ³ under bark				
Spain	8191	5160	2180	15532
Cyprus	5	1	4	10
Greece	329	189	1004	1523
Malta	-	-	-	-
Portugal	3836	6670	600	11106
Italy	1214	1473	5362	8049



Employed people in forest sector in Europe -
 ~ 500 000 people in forestry

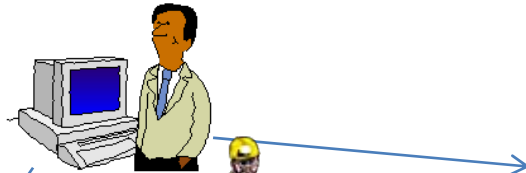


Remarkable share of total are
 employed by SME organizations
 – where ?

Persons employed in the forest sector in Europe, year 2005, *1000 pers

	Forestry	Wood- products	Pulp and paper	total
Albania	2	1	2	5
Austria	7	34	18	59
Belgium	2	14	16	32
Bosnia and Herzegovina	3	5	2	10
Bulgaria	15	20	12	47
Croatia	10	15	5	30
Cyprus	1	3	1	5
Czech Republic	20	75	20	115
Denmark	4	15	7	25
Estonia	6	19	2	27
Finland	20	30	33	83
France	30	93	92	214
Germany	40	165	140	344
Greece	5	34	7	45
Hungary	12	37	19	67
Ireland	2	9	4	15
Italy	41	176	79	297
Latvia	35	31	2	67
Lithuania	8	24	2	34
Luxembourg	0	1	0	1
Moldova	3	2	2	7
Montenegro	1	2	1	4
Norway	5	14	8	27
Poland	53	146	42	242
Portugal	12	60	12	84
Romania	60	85	16	161
Slovakia	14	37	8	58
Slovenia	4	12	6	22
Spain	25	117	55	197
Sweden	20	37	37	94
Switzerland	5	35	12	52
The FYR of Macedonia	5	3	2	9
The Netherlands	1	16	22	40
United Kingdom	16	81	93	190
Total	487	1448	779	2709
Ukraine	124	37	24	185
Russian Federation	248	358	145	751

Contractors in Forest based value chains – where can you find them ?



Young forest treatment
-industrialwood
-Christmastree-production.

Thinnings
-roundwood
-energywood

Final fellings
-roundwood
-energywood
-stumps

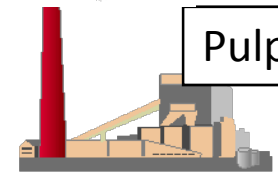
Roadside storages:
-logs
-paperwood
-pulpwood
-round energywood
-branches
-stumps



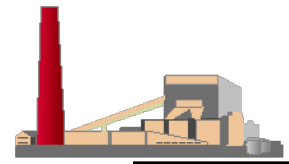
-site preparation for renewing forests
-digging, water conditions
-forest road construction
-fertilizing
-spreading pesticides



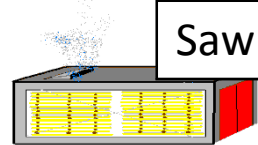
Paper



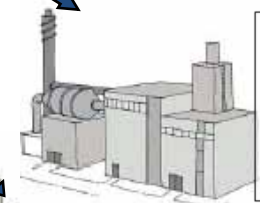
Pulp



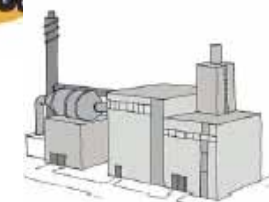
Vaneer



Sawmill



Energy
-warm
-electricity



Bio-oil refinery

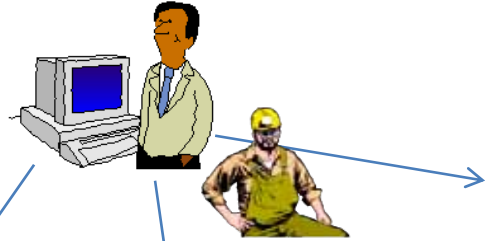
Long distance transportation
(truck, ship, train, floating ...)

Contractors in Forest based value chains – who are they?

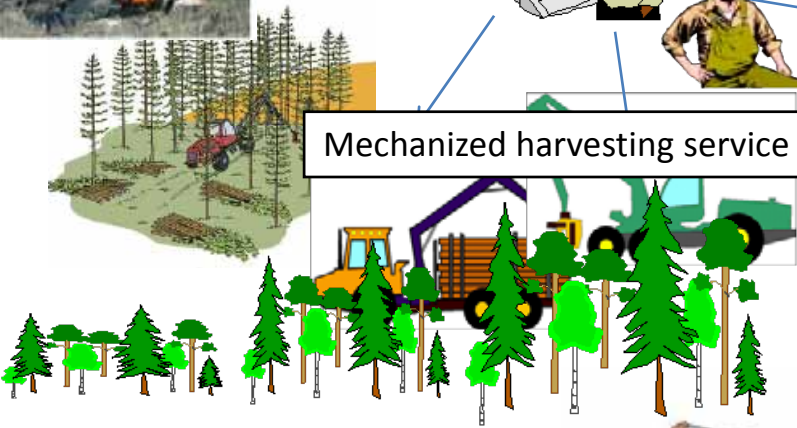
Manual workers



Wood buyers, planning and logistic experts



Mechanized harvesting service providers



Road constructors

Diggers

Planters
Site preparators



Energy wood suppliers,
-Fire log suppliers
-Stump removers
-Hauling/Transport
-Grinders
-Chippers

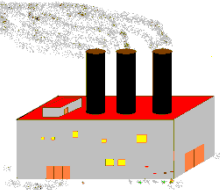
Hauliers



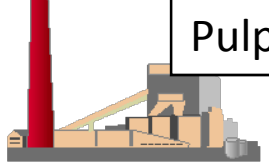
Long distance transportation
(truck, ship, train, floating ...)



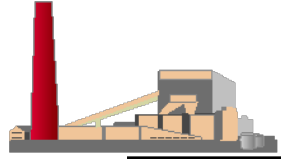
Terminal contractors
-raw-wood, product handling



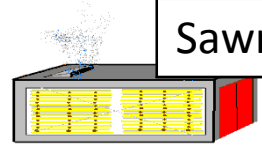
Paper



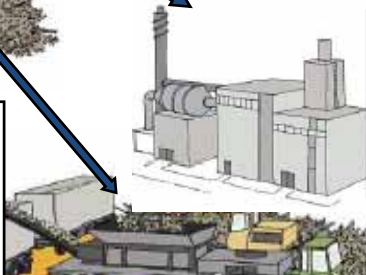
Pulp



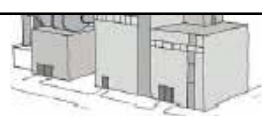
Vaneer



Sawmill

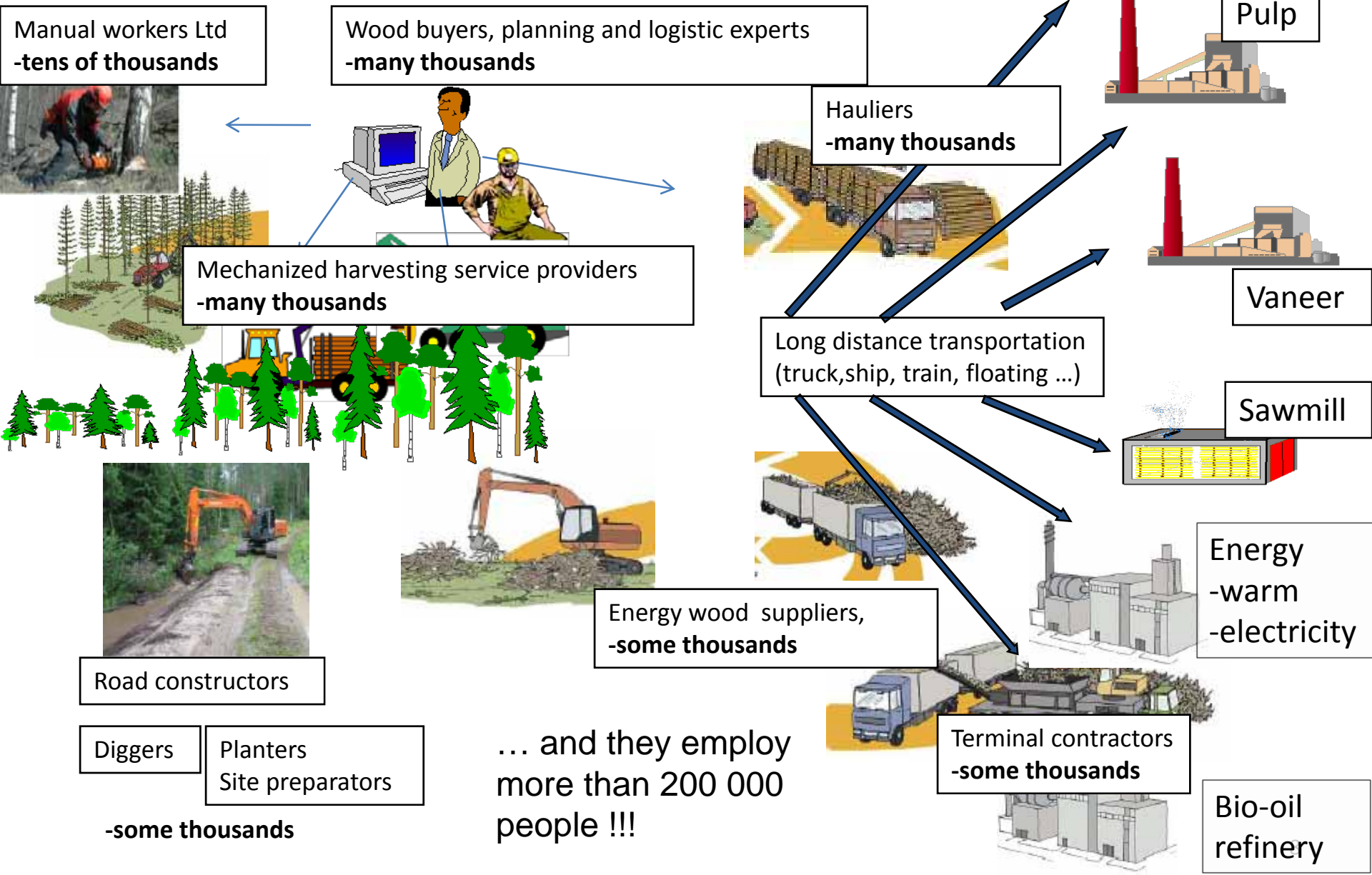


Energy
-warm
-electricity

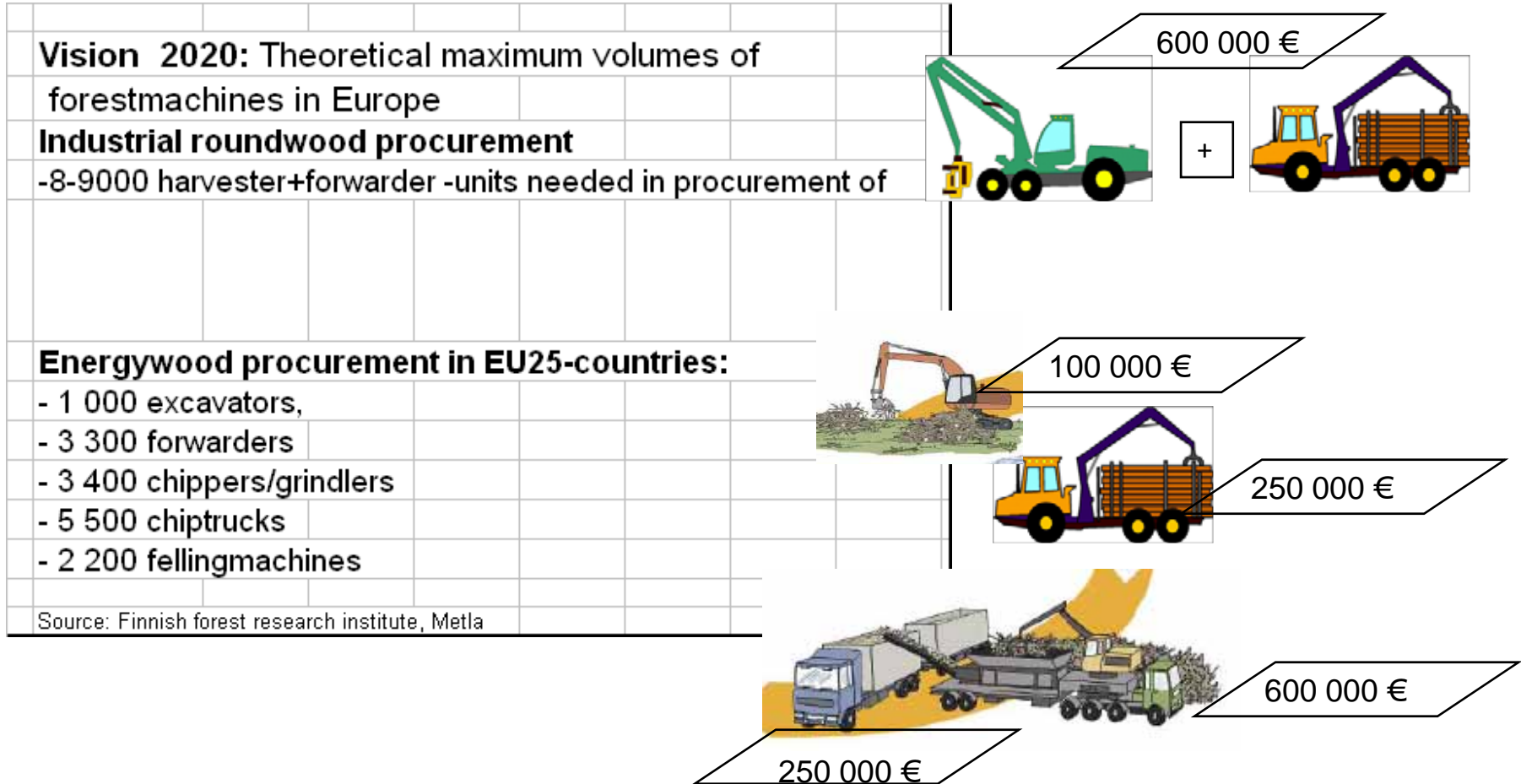


Bio-oil
refinery

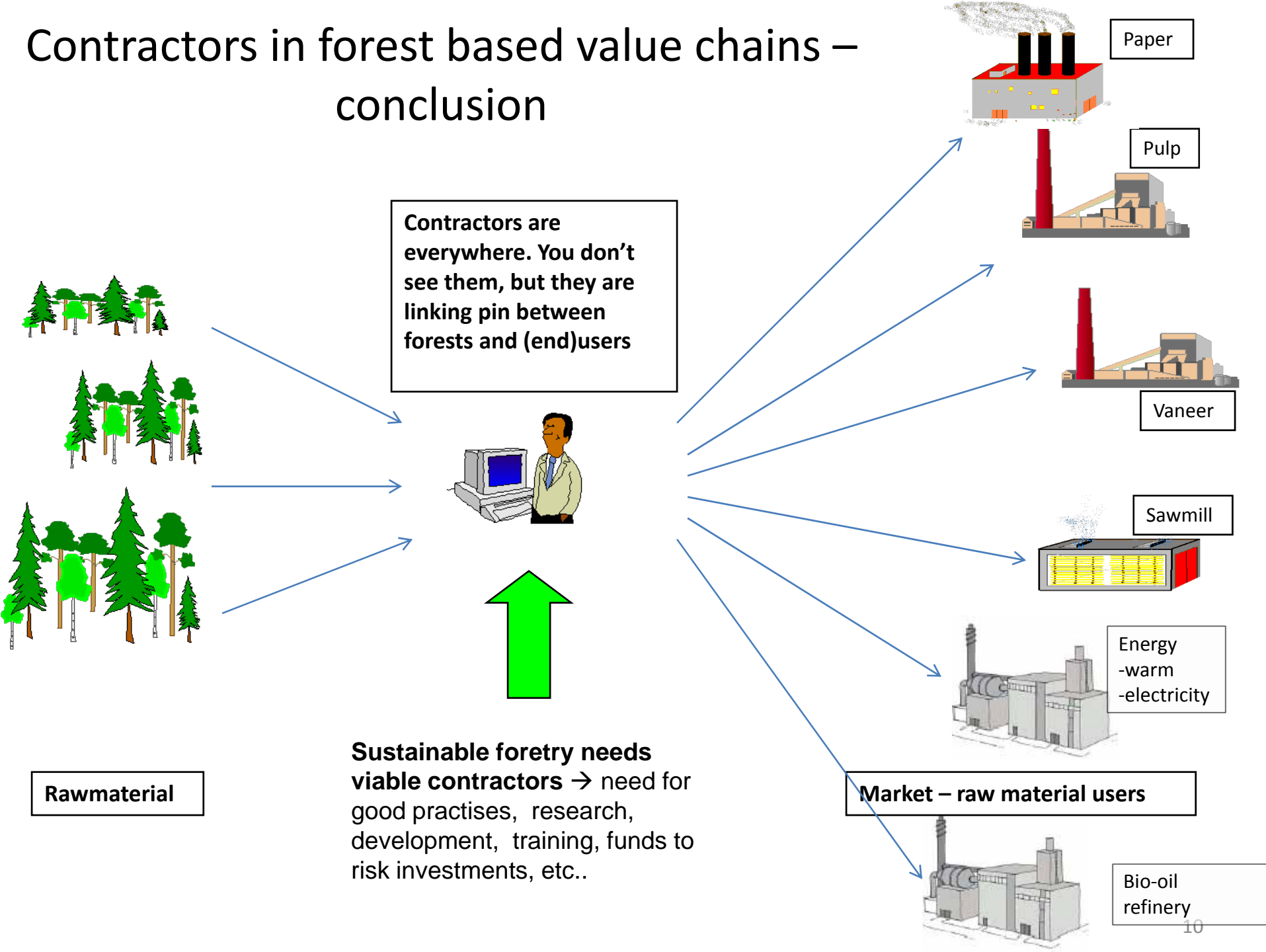
Contractors in Forest based value chains – how many are they ?



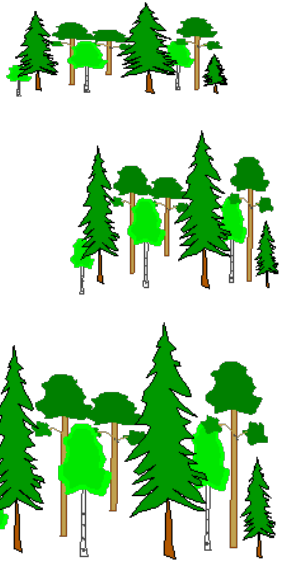
Contractors in Forest based value chains – they put huge amounts of money on machinery and their life for forestry !



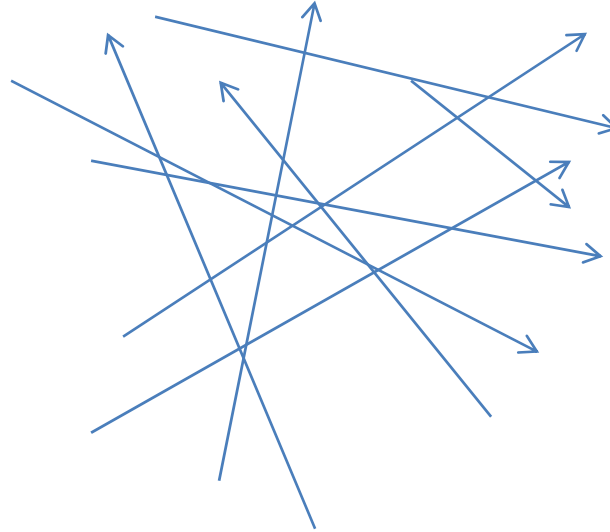
Contractors in forest based value chains – conclusion



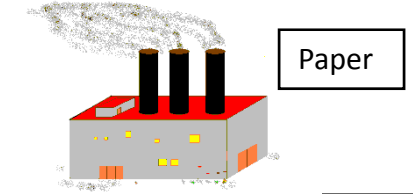
Contractors in forest based value chains – IF NOT AT ALL or NOT PROFESSIONALS



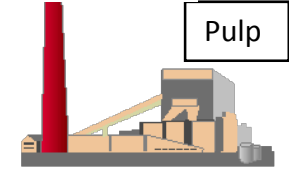
Rawmaterial



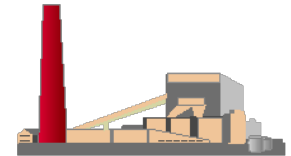
- less effectiveness
- less flexibility
- less quality
- more expenses
- more employed
- more occupational accidents ?



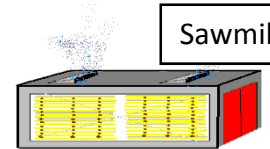
Paper



Pulp



Vaneer

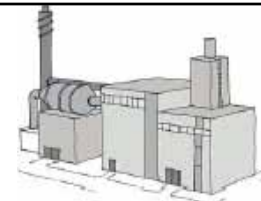


Sawmill



Energy
-warm
-electricity

Market – raw material users



Bio-oil
refinery