

Woodworking industry in Poland

BR⁺STUDIO



NORDISKT LIMTRÄFORUM 2010

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WARSAW 18.03.2010

B+R StudioTomasz Wikorski

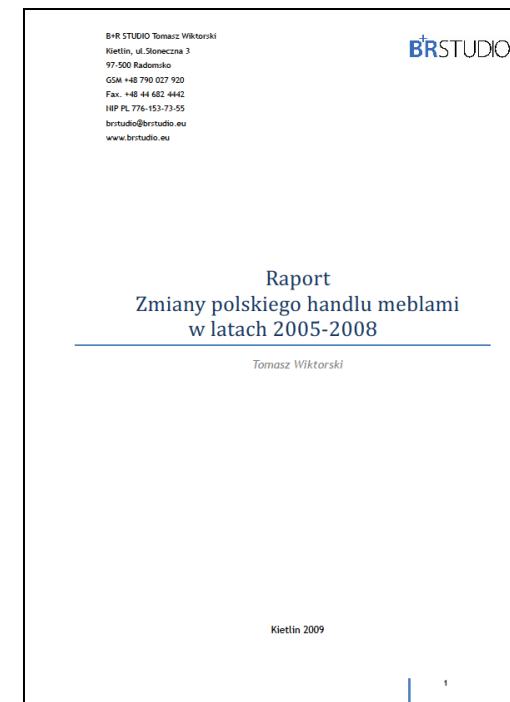
Analysis of furniture and woodproducts market

Owner of B+R Studio (R&D Studio)

Emploee of:

Warsaw University of Life Science - Faculty of Wood Technology

The Polish Chamber of Commerce of Furniture Manufacturers



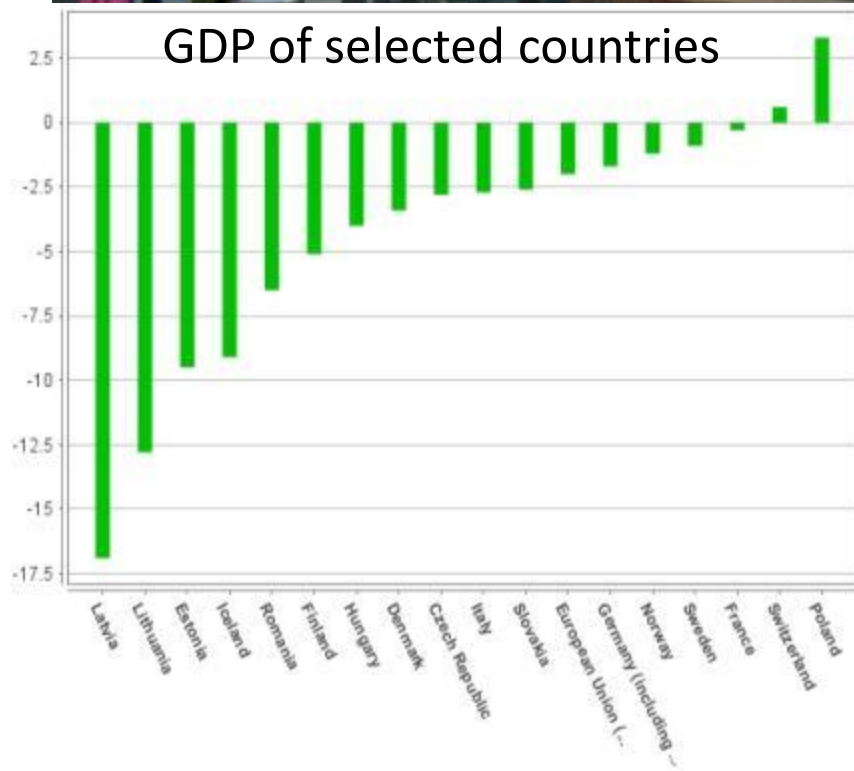


Poland in numbers

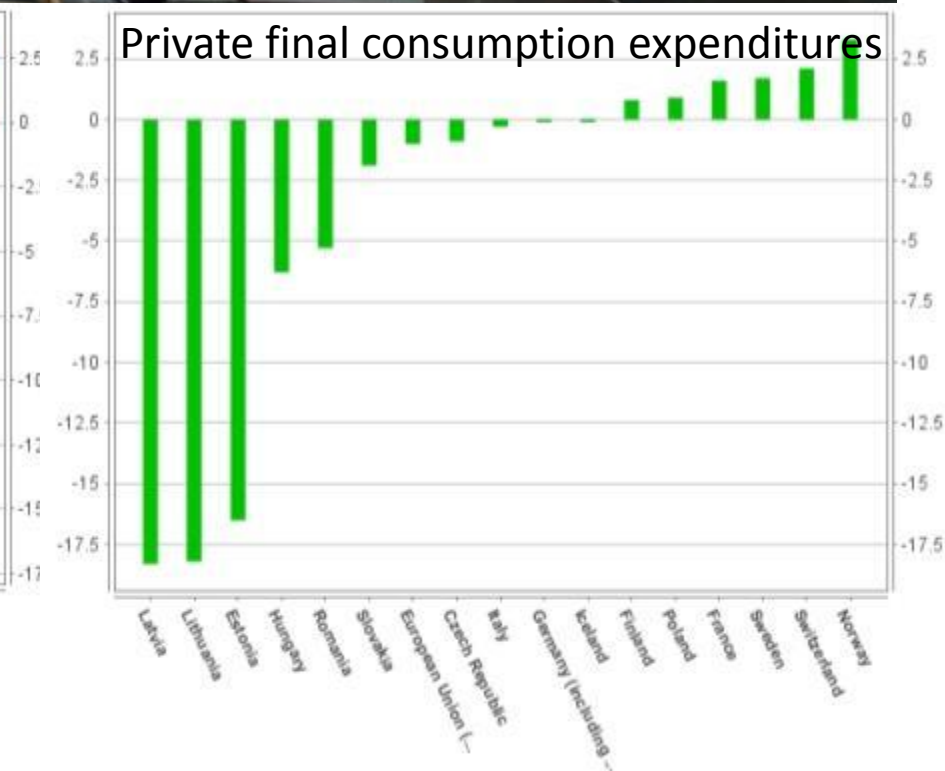
- Area – 312 000 sq km – rank 68th in the world
- Population – 38 000 000 people – rank 34th
- GDP (PPP) – 684,500 bln USD - rank 21st
- GDP per capita - 17 482 USD – rank 50th
- Inflation – 3,5%
- Unemployment – 11%
- Labour cost (per hour) – 30 PLN ca 7-8 EUR



GDP of selected countries



Private final consumption expenditures



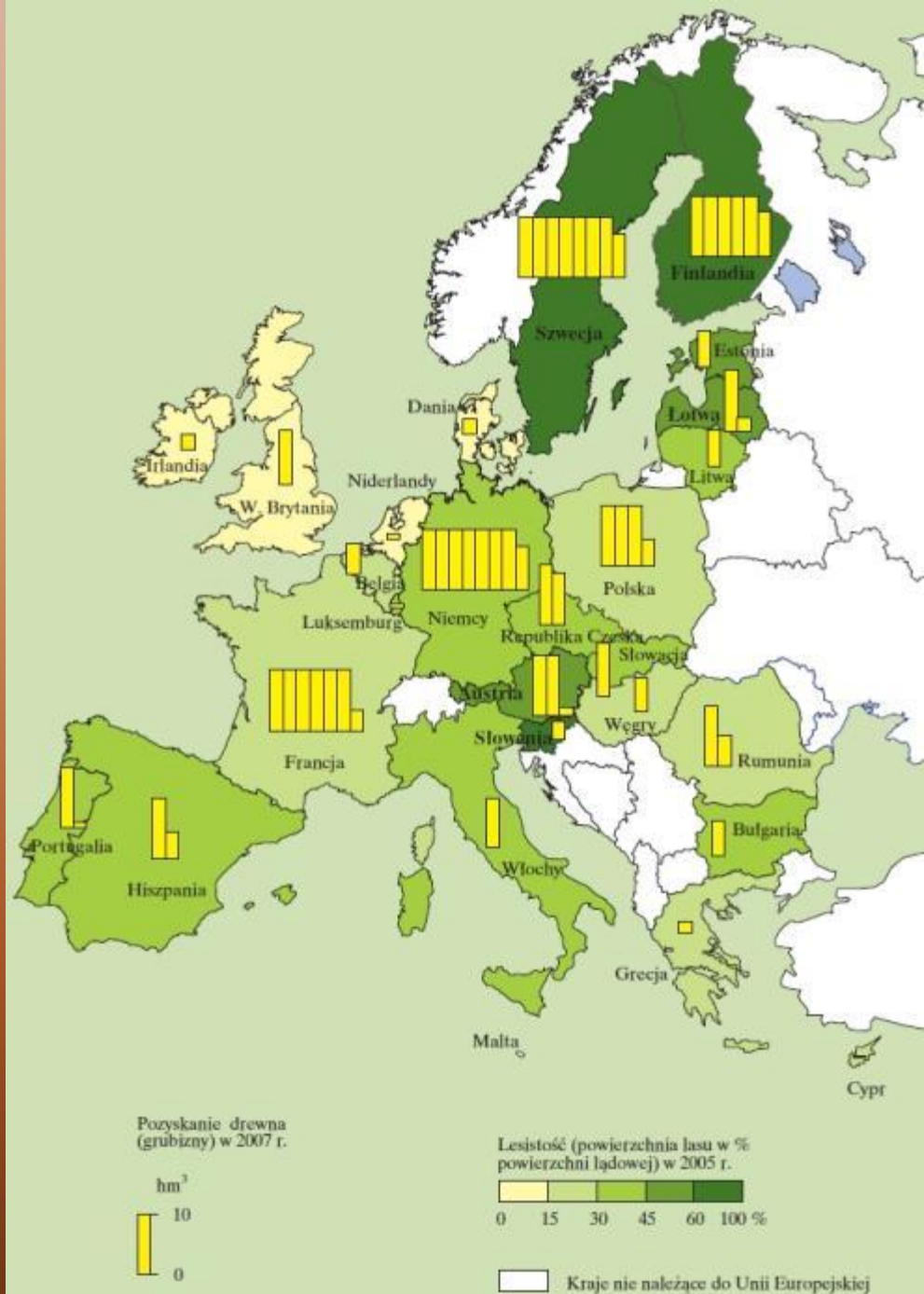
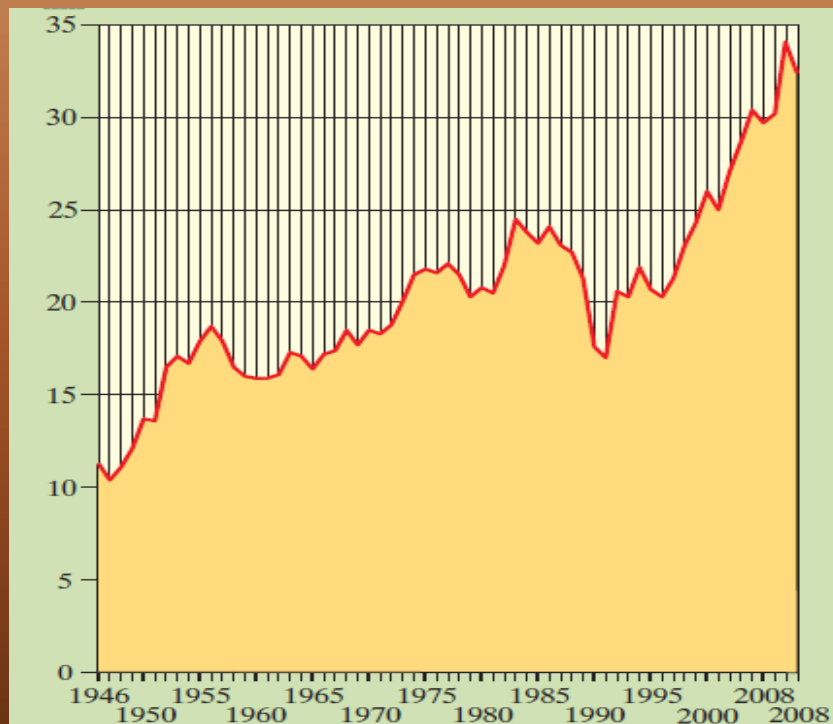


FORESTRY

Forests area and wood harvesting

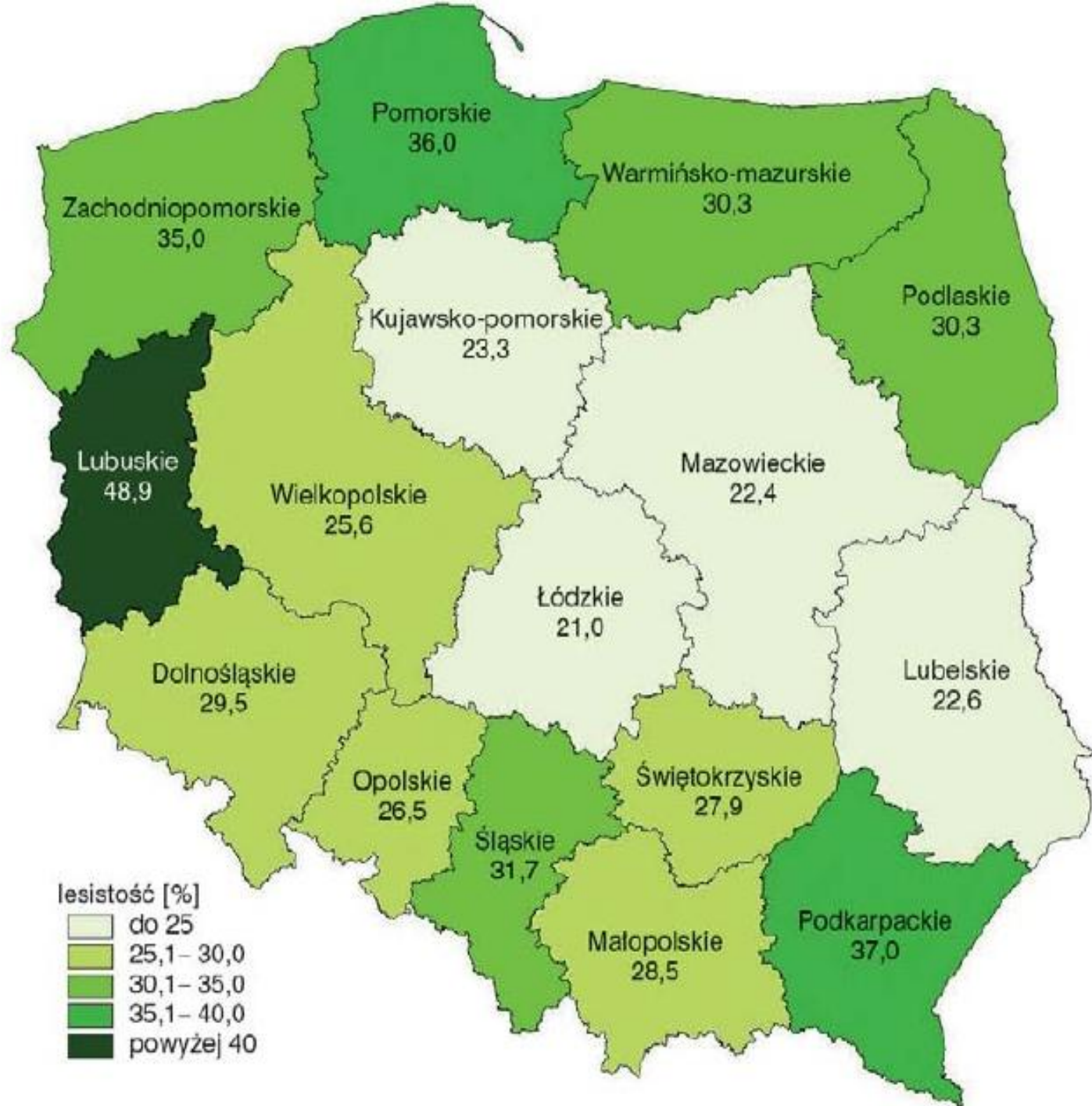
Volume of wood harvested
in Poland

	2000	2005	2008
Total cubic meters	27 659 000	31 945 000	34 273 000



Źródło: „State of the world's forest 2009”, FAO, Rome 2009, „Forest Products 2003–2007”, FAO, Rome 2009.

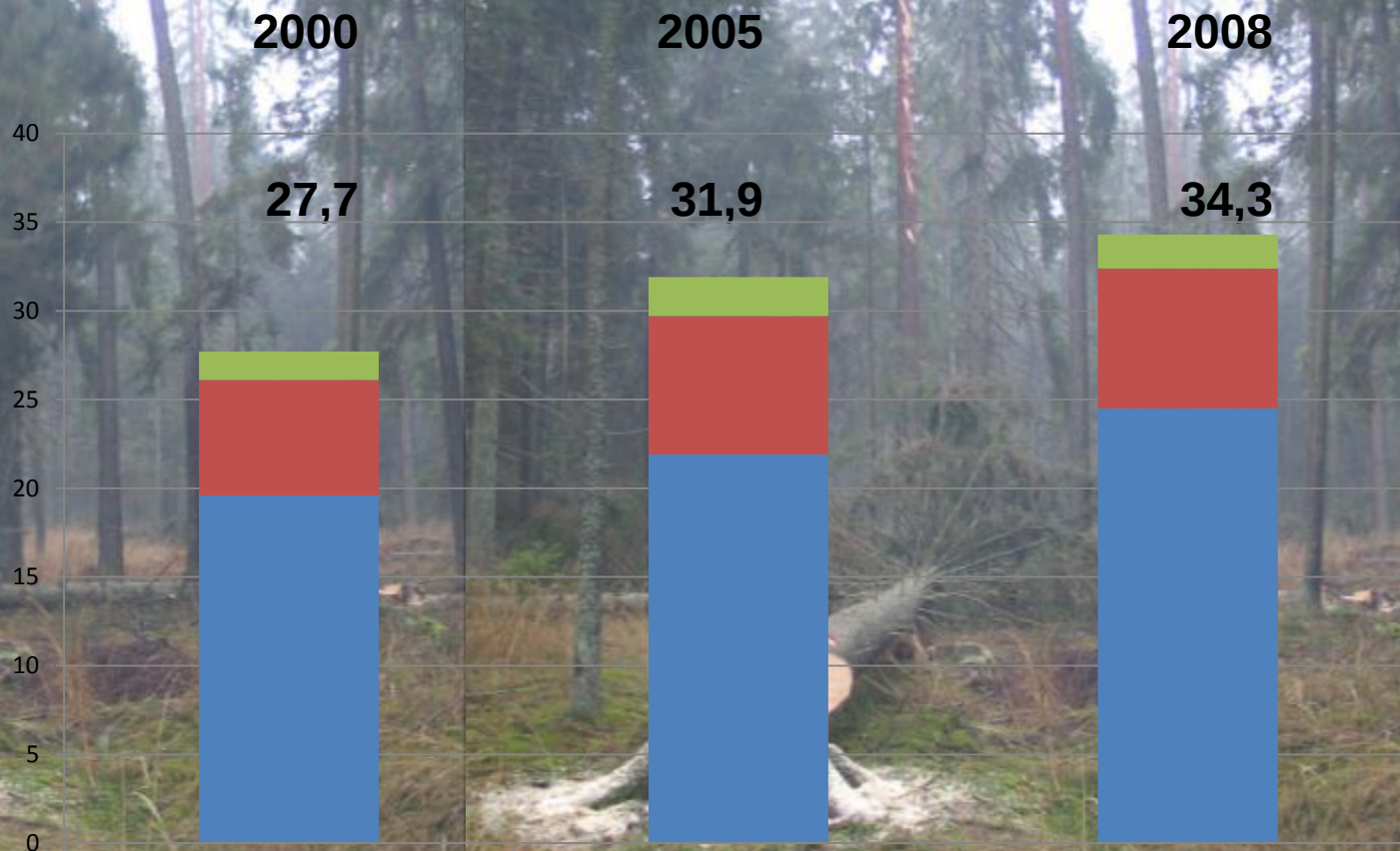
Forests area by regions (voivodship)



Volume of harvested wood

Total volume

million cubic
meters



■ Small size wood
■ Large size deciduous wood
■ Large size coniferous wood

2000

2005

2008

1,6

2,2

1,9

6,5

7,8

7,9

19,6

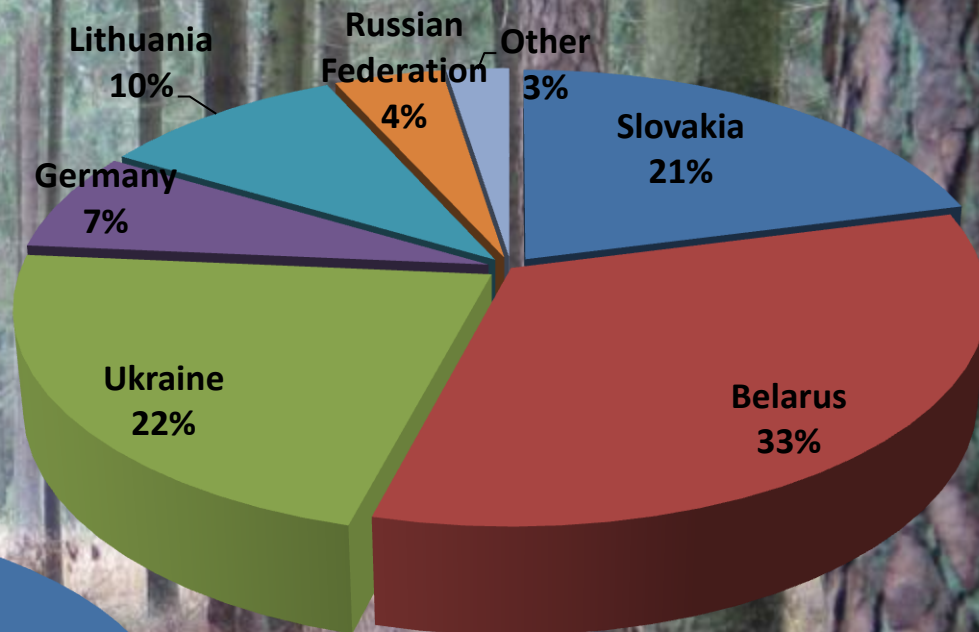
21,9

24,5

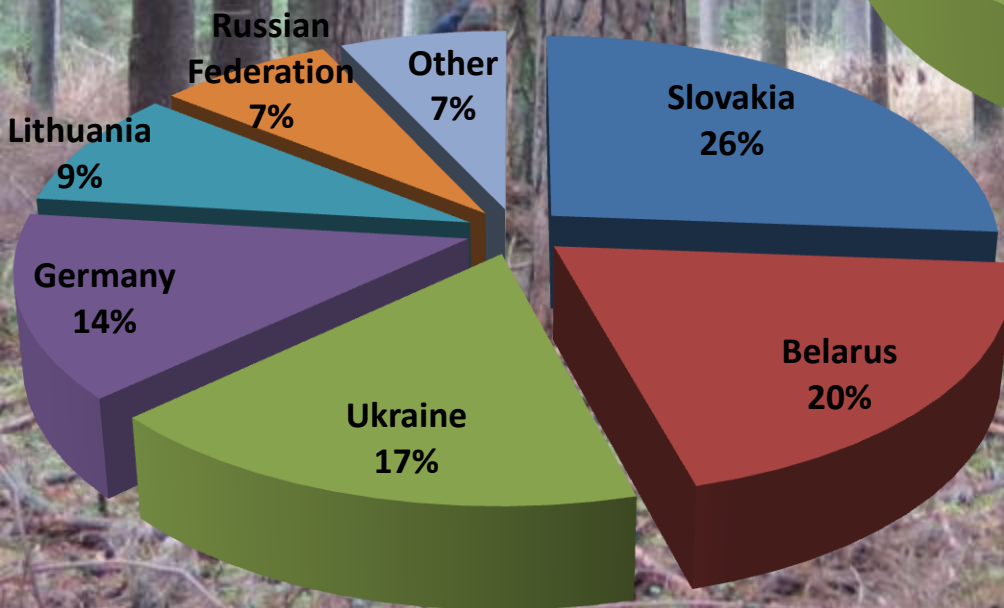
Foregin trade of round wood



Geography of wood import



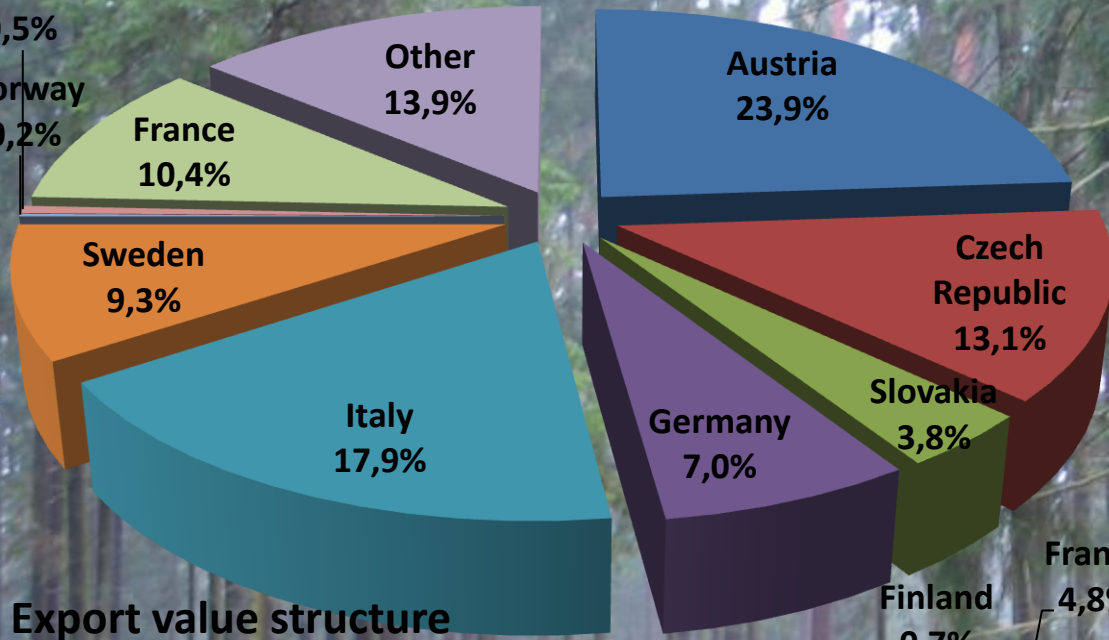
Import volume structure



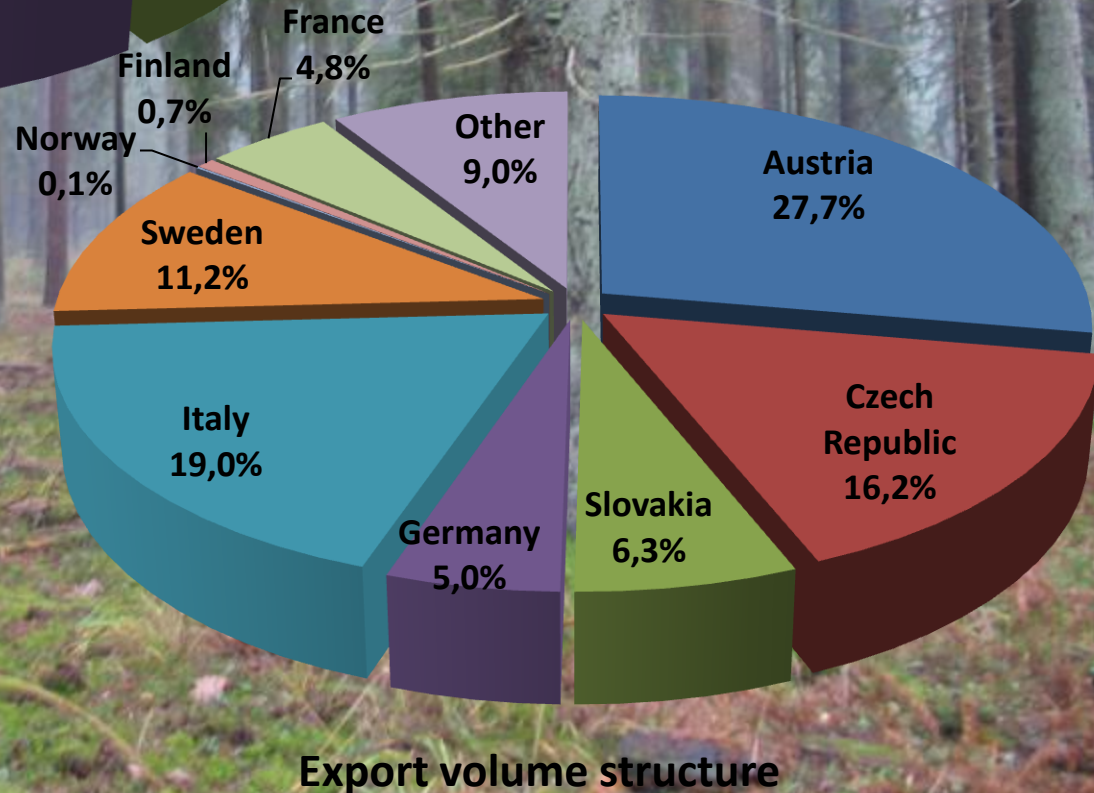
Import value structure

Import 2,7 mil m3; 98 mil eur

Geography of wood export



Export 400k m3; 39 mil euro

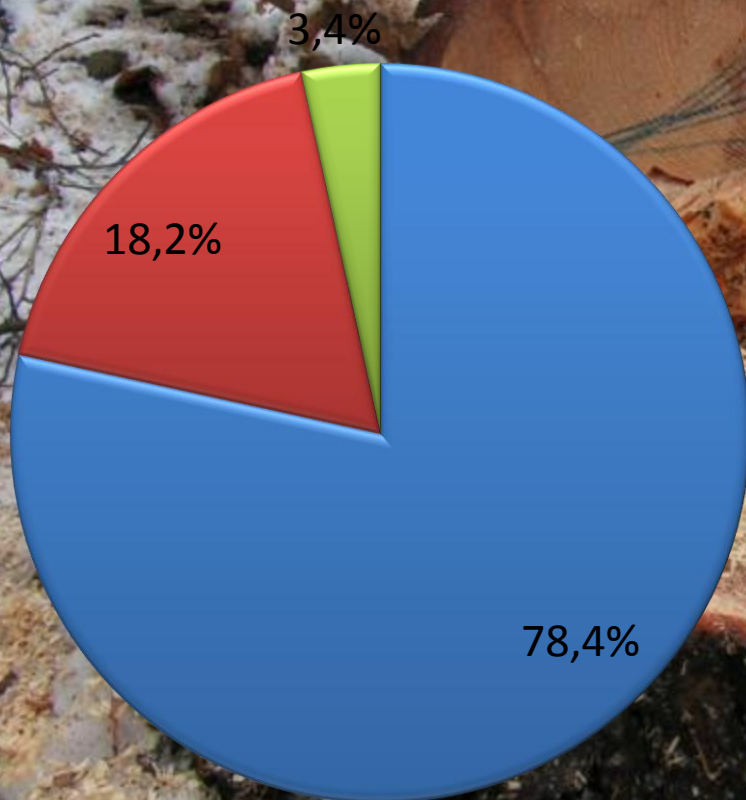




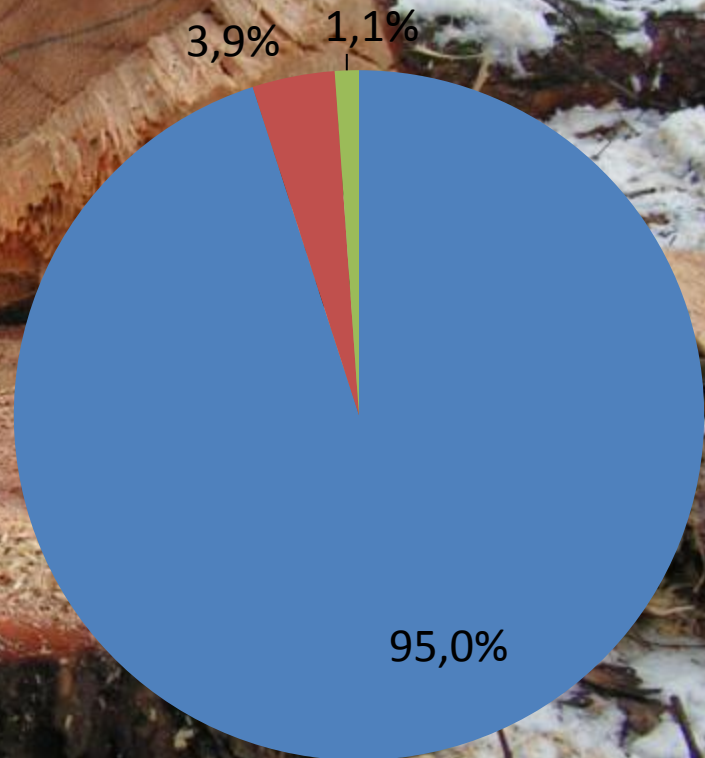


Ownership of the forests

Forest Area



Volume harvested



■ State Forest LP ■ Private forests ■ Other Public

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Woodworking Industry

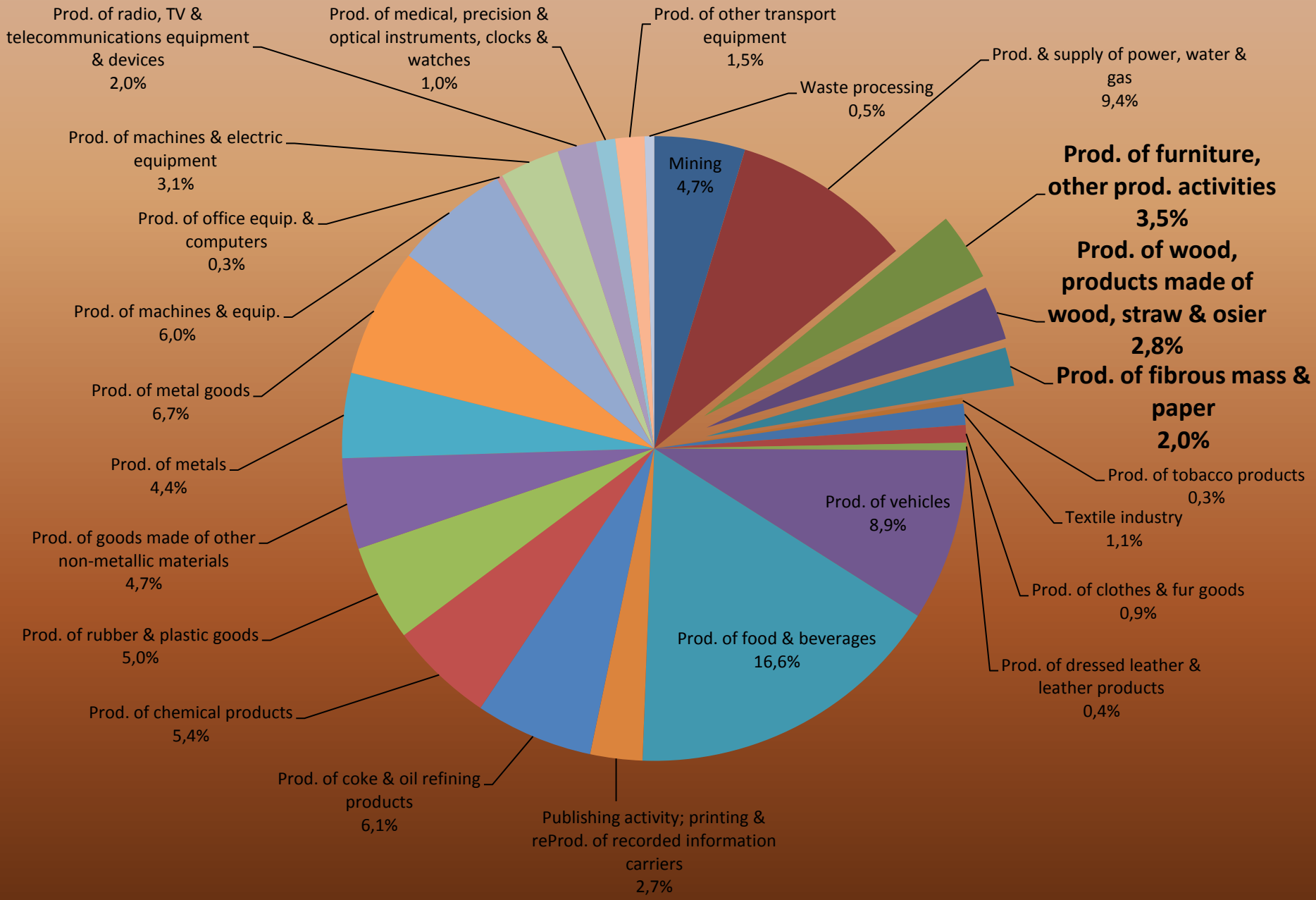


Woodworking industry in practice



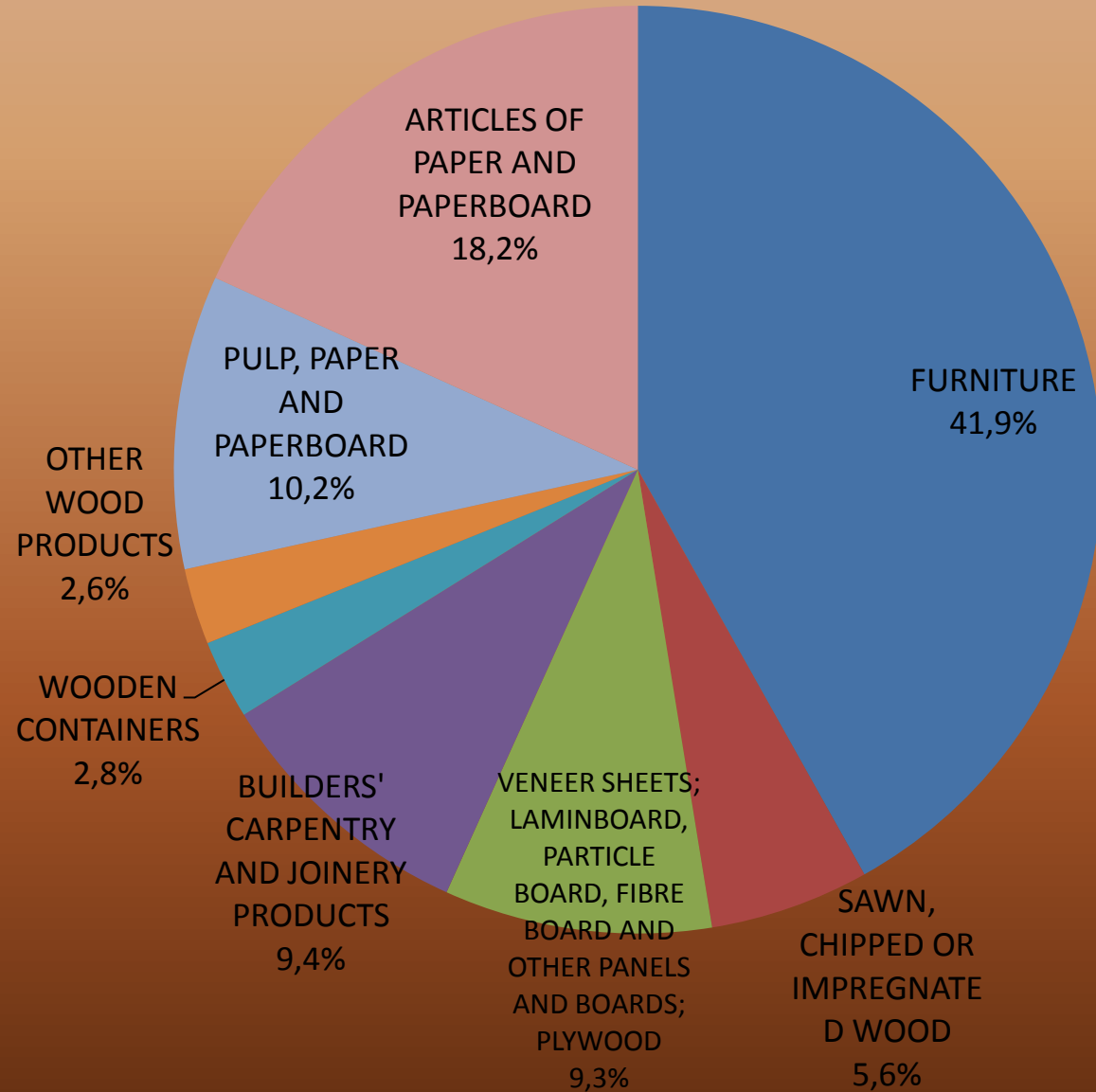


Woodworking industry in national economy

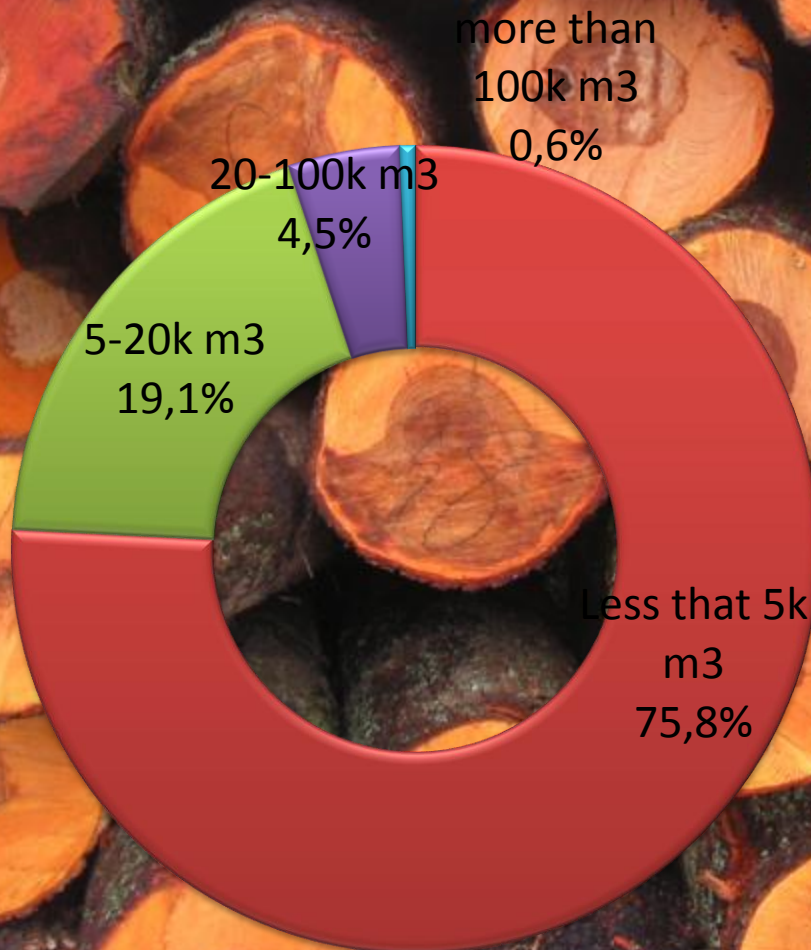


Structure of woodworking industry

FURNITURE	25 493 279,5
SAWN, CHIPPED OR IMPREGNATED WOOD	3 382 752,6
VENEER SHEETS; LAMINBOARD, PARTICLE BOARD, FIBRE BOARD AND OTHER PANELS AND BOARDS; PLYWOOD	5 677 927,4
BUILDERS' CARPENTRY AND JOINERY PRODUCTS	5 706 571,6
WOODEN CONTAINERS	1 682 239,1
OTHER WOOD PRODUCTS; ARTICLES OF CORK, STRAW AND PLAINTING MATERIALS	1 612 681,9
PULP, PAPER AND PAPERBOARD	6 232 168,5
ARTICLES OF PAPER AND PAPERBOARD	11 086 467,1
Total (thousand PLN)	60 874 087,7



Structure of woodworking industry by yearly capacity



Prefabricated elements and gluedwood



Holzbau Wehmeyer Sp. z o.o.
Konsbud Drewno Klejone
Kondrew sp z o.o
Lilleheden Sp. z o.o.
ANDREWEX Sp. z o.o.
TECHMA MODUŁ Sp. z o.o.
Poppensieker & Derix
MPM PROJECT Sp z o.o.

Buchacher Holzleimbau GmbH
MATHIS

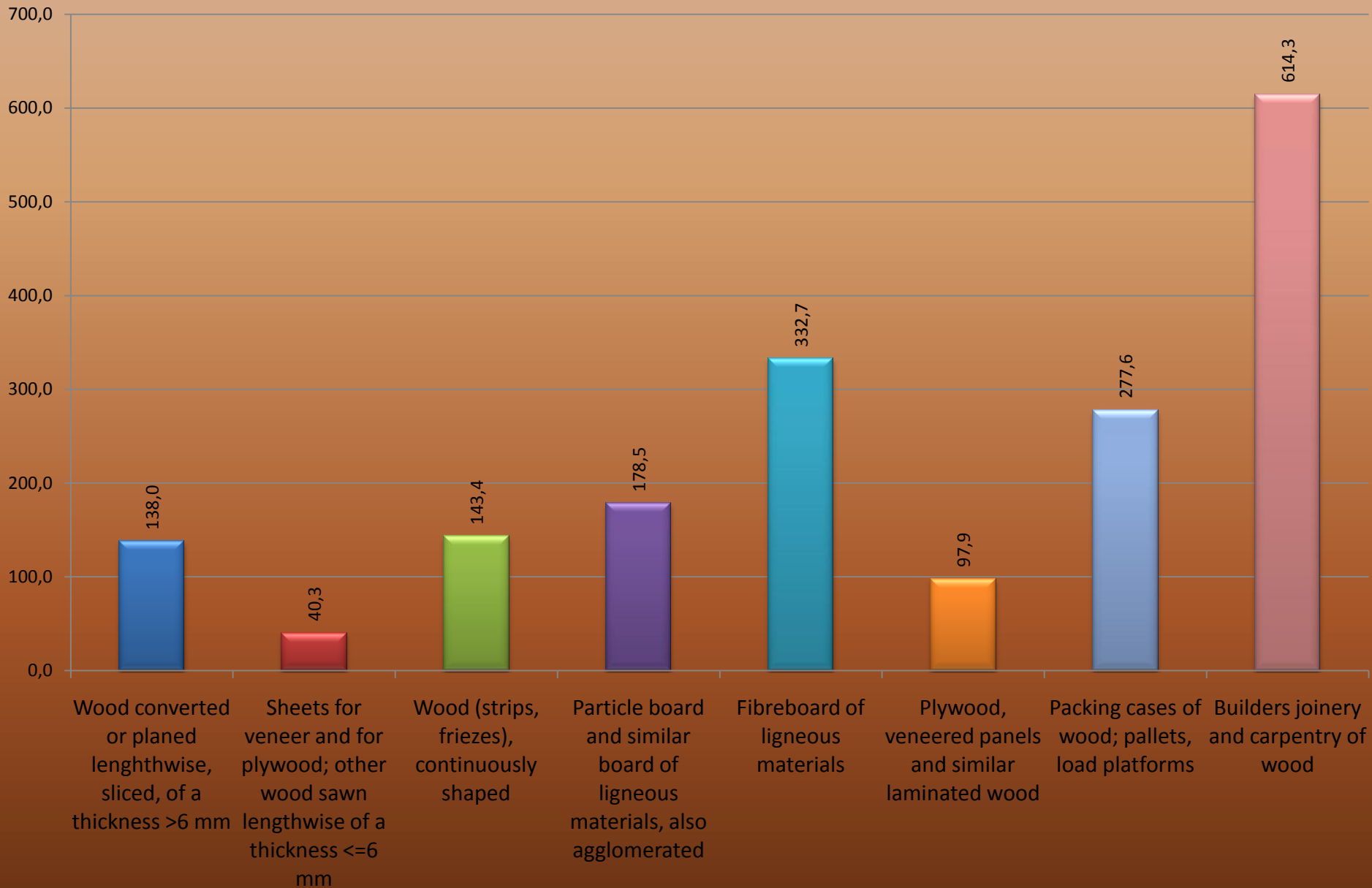
Ciecierzycze 89
Ks. Witolda 7-9
Struga 78
ul. Chylonska 191
Piętno 84
Jawornik 382,
ul. Więzienna 21
ul. Chopina 32/3

Rynek15
ul. ZAGAJE 43

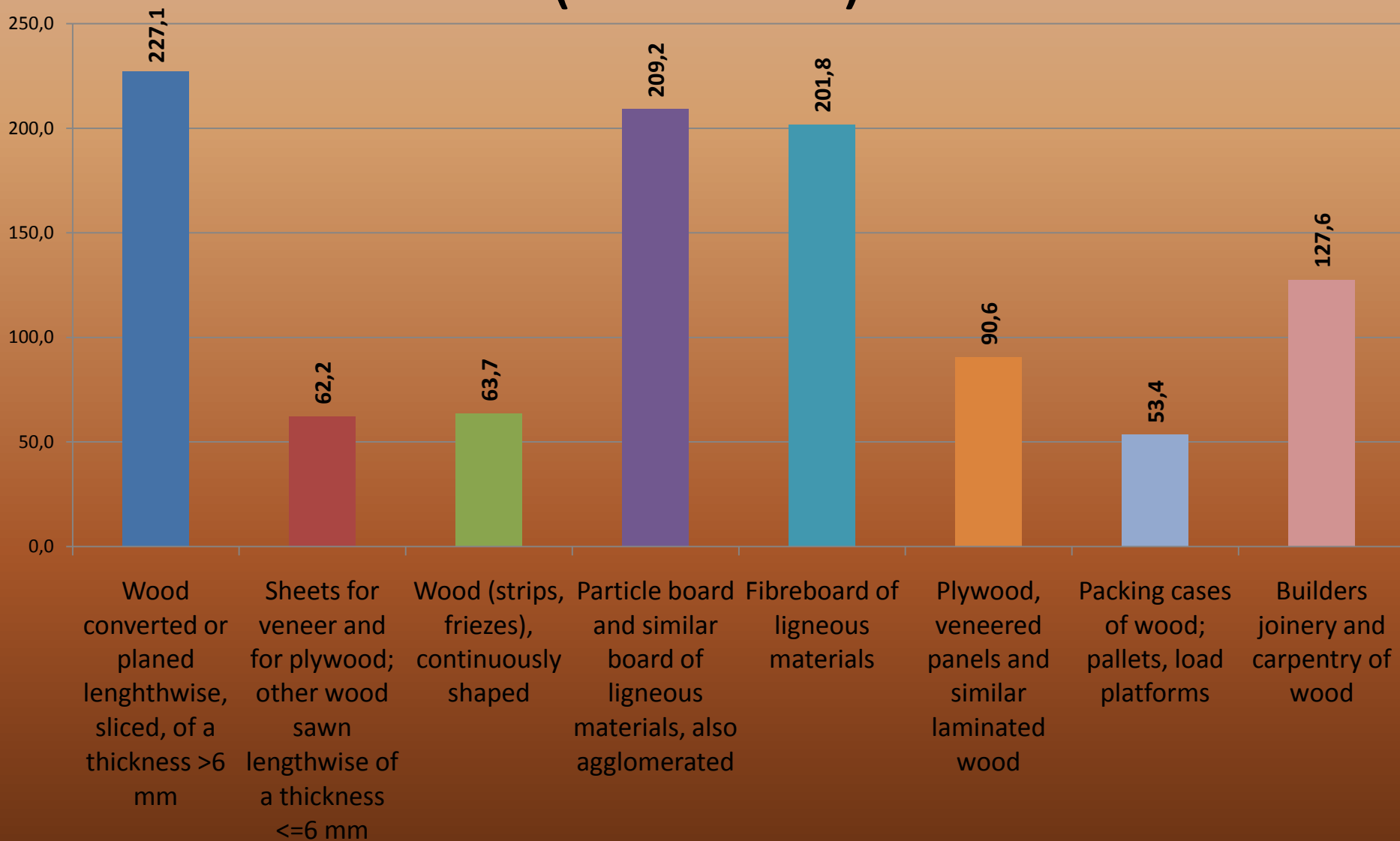
66-446 Deszczno
71-063 Szczecin
70-784 Szczecin
81-007 Gdynia
62-740 Tuliszków
32-400 Myślenice
50-118 Wrocław
30-049 Kraków

44-200 Rybnik
30-437 KRAKÓW

Export of wood products (mil euro)



Import of wood products (mil euro)



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