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European Organisation of Agricultural, Rural and Forestry Contractors

Confédération Européenne des Entrepreneurs de Travaux Techniques Agricoles, Ruraux et Forestiers

Europäischer Zentralverband der land- und forstwirtschaftlichen Lohnunternehmer und ländlichen Dienstleistungsunternehmern

(AS\Forestry\forestry questionnaire 2016-2017 new lay-out)

**CEETTAR Standing Committee Forest**

**Identifying role and potential problems for forest  
contractors**

**First aggregate results**

April 2018

## Question 1 : Number of forestry contractors

Question	Total	Forestry management & planning	Sylviculture	Wood harvesting	Other
Belgium				1 958	
Bulgaria	3 459	6	4 350 * (for all three sub-sectors)		
Denmark	App 180 no official figures	3 big companies: the state, Hededanmark & skovdyrkerne (last one is owned by the forest owners)	- (Christmas trees production is agricultural sector)	App. 140	App. 100 wood-chippers at contractors business
Finland	~ 3 000	200	200 (mechanized work) 500 manual work	1 500	600 (haulers, round wood transport)
France	7 850	?	850	7 000	-
Latvia	600 commercial enterprises (Timber transport and/or harvesting) 2 000 self-employed people (mostly chainsaw operators, silviculture contractors) Part of them also work for contractors.	Mostly all of the companies that provides harvesting services for small and medium private forest owners are doing also management plans, but private owner can also go to more specialized consultation centres (some of them -state owned) and "buy" this planning service. It is hard to determine the role of contractors here.	About 200 small enterprises, hard to distinguish how many from self-employed people are working here.	378 (159 of them are doing both – harvesting and transportation)	343 (159 of them are doing both – harvesting and transportation)
Spain	36 150	18% = 6 507 companies	Included above	72% = 26 028	8% = 2 892 (paper Industry) 2% = 723 (hunting management)
Sweden	5 606 (contractors involved in several types of services)	8%	39%	88%	8% (trailing, fertilizing, wood procurement, arborists, building fences, snow treading, forest roads...)

Netherlands	200	25	25	150	<p>Difficult to separate various tasks of forestry contractors: often they have multiple tasks incl. landscape maintenance, biomass production, pruning, etc.</p> <p>We have no statistics! So all data are best guess from my side only. (and beware: many activities are not restricted to the (possibly) limited interpretation / definition of forest contractor)</p> <p>Woodchip for biomass</p> <ul style="list-style-type: none"> <li>-Cork</li> <li>-All fruits from umbrella pines</li> <li>-Chest</li> <li>-Mushrooms</li> </ul> <p>Tree resin</p> <p>Almost exclusively working in cable yarding</p>
Portugal	2 000	80%	80%	70%	
Italy*	1206	?	?	?	

\* Italy: the replies only concern forestry contractors operating in the Alps, not in the whole country.

**Question 2: estimated market shares of Forestry contractors in Forestry operations**

Question	Forestry management/ planning	Sylviculture	Wood harvesting	Other
Belgium*		75%	95%	
Bulgaria	100%	95%	95%	90%
Denmark	Estimated 20%	70 – 80%	80-90%	
Finland	Estimated <10%	Estimated >90% (mechanized) Estimated 50% (manual)	100%	100 (round wood transport by trucks)
France	?	70 %	80%	-
Latvia	20%	80%	95%	95% (timber transport)
Spain	Done by public authorities	Private companies but no data	Private companies but no data	-
Sweden	<5%	90-95%	90-95%	Individual forest owners work almost as many hours as contractors in their own forests
Netherlands	95%	95%	95%	95%
Portugal	15%	100%	100%	65%
Italy	?	?	?	?

\* Belgium: not very relevant want few contractors are only doing contracting works

**Question 3: number of forest machines**

Question	Harvesting machines / heads	Forwarders	Forwarders	Forwarders	Tractors	Chippers / crushers	Timber trucks
		Forwarders	Skidder	Loaders			
Belgium	-	-	-	-	-	-	-
Bulgaria	2-3	10	350	-	700	-	-
Denmark	140	200	-	-	-	100 bigger machines	-
Finland	2 200	2 200	-	-	Hundreds mainly owned by forest owners	250	-
France	750	1.250	1 100	-	-	-	-
Latvia	300	500	We are not working with this technology	Only at delivery points (sea ports, railway loading points, mills)	No data	No data	About 1 000 registered (~ 500 active)
Spain	No data	-	-	-	No data	No data	-
Sweden	1 500-2 500	1 500-2 500 100%	-	-	Few	No data	-
Netherlands	75 (also working in BRD and BE and FR)	100	15	20	45	75	-
Portugal	3 800	-	-	-	-	-	-
Italy*	359	-	-	-	1872	-	-

\* Italy: most of the contractors doing cable yarding

#### Question 4: number of employees

Question	Planning	Manual workers	Machine operators	Total	Estimated share of foreign workers in the total employees
Belgium	-	2 464*		2 464	30%
Bulgaria	~ 120	~ 7 000	~ 1 000	~ 8 120	0%
Denmark		Forestry: ~ 500 Christmas trees many mid-October to mid-December	600		Machine operators: <5% Christmas trees about 75%
Finland	50	3 000	5 500	8 550	< 5%
France	-	-	-	8 150 (FTE) or 14 900 contracts	?
Latvia	~500	1 500	1 300	~2 850	3%
Spain	24.252 contracts (from project managers to forest firefighter and rangers)	36 123 contracts	2 234 contracts	62 610 contracts	No data
Sweden	-	Estimate 2 000	8 000	10 000	30-35% (sylviculture, not in logging activities)
Netherlands	100	300	250		<5%
Portugal	-	-	-	78 000 employees**	
Italy***	?	?	?	3 563	?

\* Belgium: data include manual workers and machine operators

\*\*Portugal: 3 years ago, there were 250.000 manual workers. This kind of work demands manual work because:

- using chainsaws, they can't cut the whole tree
- if machines are used, the risk of fungus increases

\*\*\* Italy: the information concerns only forestry companies operating in the Alps.

**Question 5: wood (measures in volume over bark)**

Question	Total harvest put on the market	Property type	Property type	Property type	Property type	Tree types	Tree types
		Public – state	Public – commune/ local authority	Forest companies or similar big forest owners	Private	Hardwood	Softwood
Belgium	~4.8Mm <sup>3</sup>	2.2Mm <sup>3</sup>	-	-	2.6Mm <sup>3</sup>	1.2Mm <sup>3</sup>	3.6Mm <sup>3</sup>
Bulgaria	~7.5Mm <sup>3</sup>	~4.5Mm <sup>3</sup>	~1.0Mm <sup>3</sup>	~2.0Mm <sup>3</sup>		70%	30%
Denmark	~3.91Mm <sup>3</sup>	0.6Mm <sup>3</sup>	0.2Mm <sup>3</sup>	0.1Mm <sup>3</sup>	3.0Mm <sup>3</sup>	1.0Mha	2.91Mha
Finland	56 Mm <sup>3</sup>	6 Mm <sup>3</sup>	0Mm <sup>3</sup>	5Mm <sup>3</sup>	45Mm <sup>3</sup>	?Mha	?
France	~35 Mm <sup>3</sup>	6.2 Mm <sup>3</sup>	8.1 Mm <sup>3</sup>	?	21.7 Mm <sup>3</sup>	9.2 Mha	3.1 Mha
Latvia	11 Mm <sup>3</sup>	5,39Mm <sup>3</sup>	No data (goes under private forests but accounts for less than 1%)	No data (goes under private forests but accounts for about 30% of private)	5,4 Mm <sup>3</sup>	1,72Mha (this is total area of forest land by dominant specie, not the harvested area)	1,58Mha (this is total area of forest land by dominant specie, not the harvested area)
Spain	13.2 Mm <sup>3</sup>	? Mm <sup>3</sup>	? Mm <sup>3</sup>	? Mm <sup>3</sup>		6.15 Mm <sup>3</sup>	7.05 Mm <sup>3</sup>
Sweden	86.3 Mm <sup>3</sup>	9.9 Mm <sup>3</sup>	0 Mm <sup>3</sup>	25.5 Mm <sup>3</sup>	51.3 Mm <sup>3</sup>	~20%	~80%
Netherlands	1,2 Mm <sup>2</sup>	0,3 Mm <sup>2</sup>	0,15 Mm <sup>2</sup>	0,15 Mm <sup>2</sup>	0,60 Mm <sup>2</sup>	0,14 Mha	0,22 Mha
Portugal	?	?	?	?	?	?	?
Italy*	1,9 Mm <sup>3</sup>	?	?	?	?	?	?

\* Italy: the information concerns only forestry companies operating in the Alps.

**Question 6a: Contract type and basis of payment ½**

Question	Written contracts	Typical duration	Turn-over (most important client)
Belgium	25-50%	Single workplace and 6-12 months	25-50%
Bulgaria	75-100%	From 2 to 12 months. Multiannual just started	50-100%
Denmark	-	From work to work or 4-6 years contracts with State	50-75%
Finland	75-100%	6-12 months & multiannual (most frequent)	75-100%
France	75-100%	Single workplace and 6-12 months	75-100%
Latvia	75-100%	2 to 6 months and multiannual	50 to 75%
Spain	75-100%	6-12 months	No data
Sweden	75-100%	Sylviculture is mainly yearly commitment Almost all are multiannual	75-100% most contractors have only 1 client
Netherlands	75-100%	Single workplace Contracts are per job: contractor buys the (standing) timber. Employees are mostly multiannual linked to the entrepreneur. More often nowadays is the self-employed contractor.	25-50%
Portugal	50%	From work to work to one year	75-100% most contractors have only 1 client
Italy	?	?	?

Question 6b: Contract basis of payment ½

Question	Payment basis Measure by harvesting head	Payment basis Measure by stack of wood	Payment basis By weigh bridge	Payment basis By lorry road	Payment basis By time	Payment basis By hectare	Other methods
Belgium	Yes	Yes	Yes	Yes	Yes	Yes	Per Stere Conifers: machine head or road side Chips: tons x moisture % Good customer relation: by time 19.7% - - - - Standing measurement/estimate or road side measurement of single (higher value) tree lengths or measurement of the saw mill ?
Bulgaria		90%	10%				
Denmark							
Finland	75%	2.3%	0%	2.4%	n/a	0%	
France	Yes	Yes	Yes	No	Yes	Yes	
Latvia	80%	20%	No	No	No	No	
Spain	-	-	-	-	-	-	
Sweden	Upcoming. For firewood	-	100%	-	Sometimes in abnormally difficult works	-	
Netherlands	<10%	35%	15%	0%	5%	5%	
Portugal	No	No	Yes	No	No	No	
Italy	?	?	?	?	?	?	

**Question 6c: Contract deadline & penalties**

Question	Deadline	Penalties
Belgium	30 days	Not in practical
Bulgaria	30 days	No
Denmark	15 – 30 days or when delivered and measured at factory/ plant	Theoretically 2%/month
Finland	2 to 4 weeks	2 to 4 weeks
France	45 days from the end of the month or 60 days "date to date"	Yes but not used
Latvia	Usually, 15 days	Yes, but no precise info
Spain	-	-
Sweden	20-30 days sometimes 60 days for small sawmills	Very seldom. Big companies pay in time. Might happen with small sawmills.
Nether-lands	From the wood processing industry, it might be up to 90 days, whereas the forest owner or the timber trader might pay within a month. Standing sales works differently: the forest owner wants 25% payment in advance and the wood processing industry pays (sometimes) only 90 days after delivery. In that situation, the forestry contractor acts as a bank	30 days, sometimes 120 days from the wood processing industry
Portugal	Largely depending on the contract	
Italy	?	?

