

Forestry services market in neighboring Italy



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Regional partners



Presentation

- 1 - Survey of logging companies in Northern Italy
- 2 - Analysis of their perspectives and challenges
- 3 - Online database of logging companies

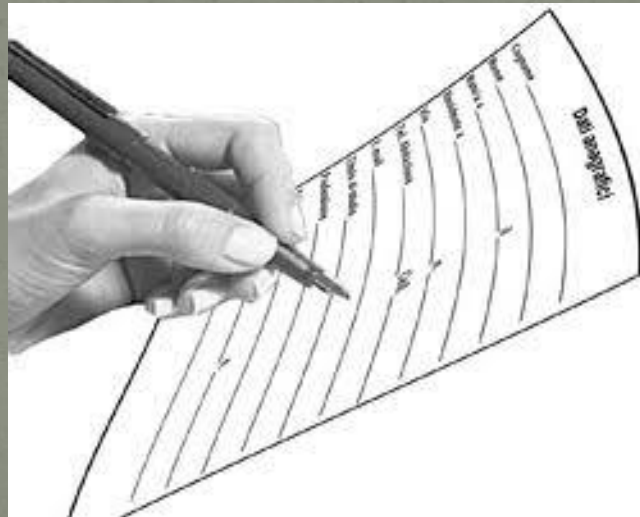
Definition: logging company

1 – Survey of companies



Survey methods

- Analysis of registers of certified companies
- Filled up by the companies (self-declaration)
- Supplied by regional offices



- Interviews on a sample (320 companies or 25%)

Limits of this survey

- Some (few) companies are not included
- Accuracy of self-declarations
- Etherogeneity of regional databases



Overview

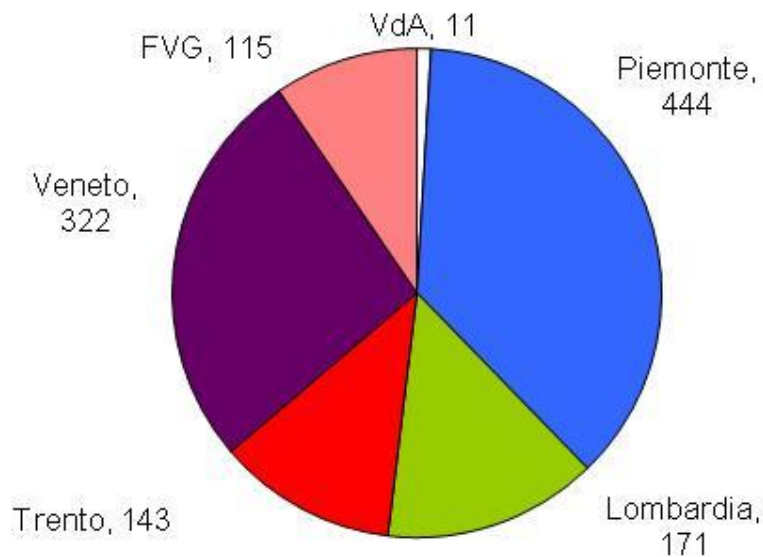
- Italian Alps only
- VdA, Piemonte, Lombardia, PAT, Veneto, FVG



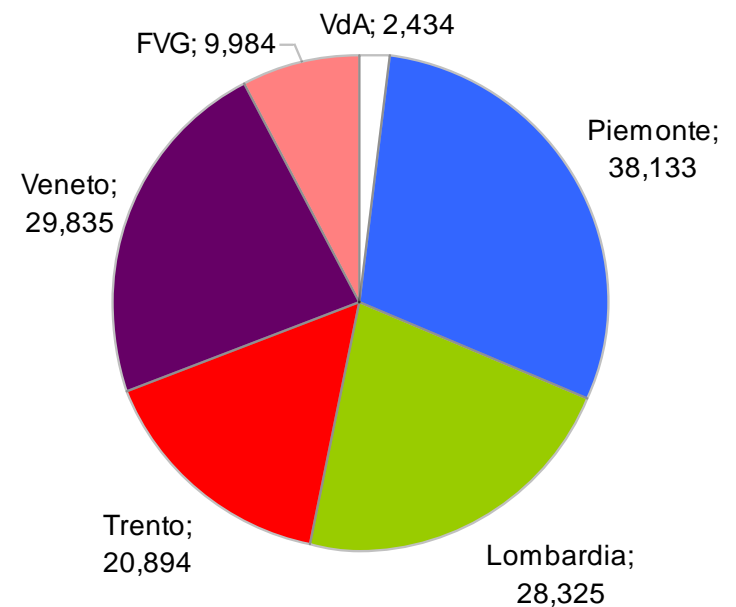
Companies	1206
Workforce	3563
Annual cut m3	1,919,766
Tractors	1872
Yarders	359
Processors	56
Current value €	130,000,000

By the Region

Companies, n°

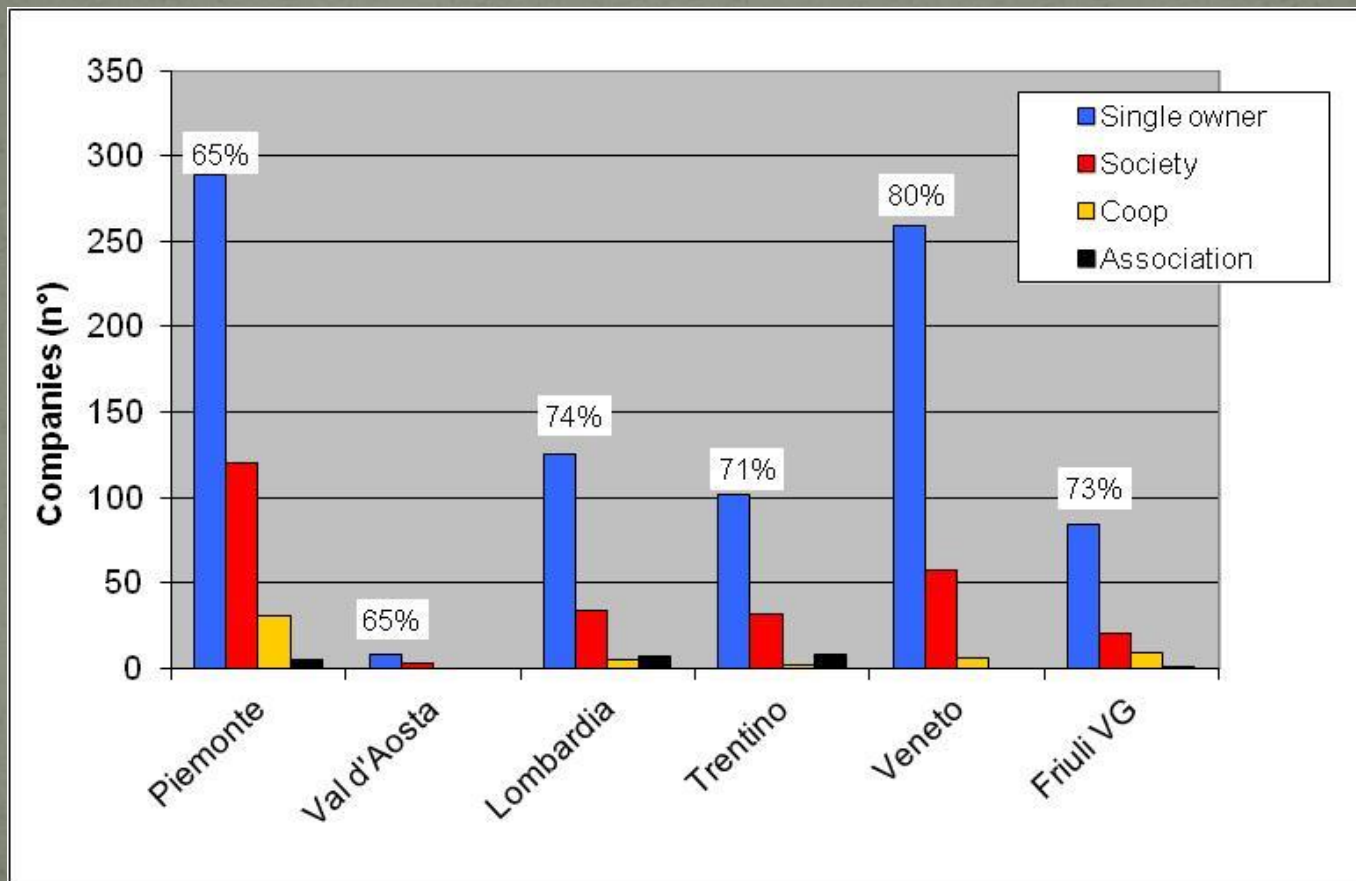


€ x 1000



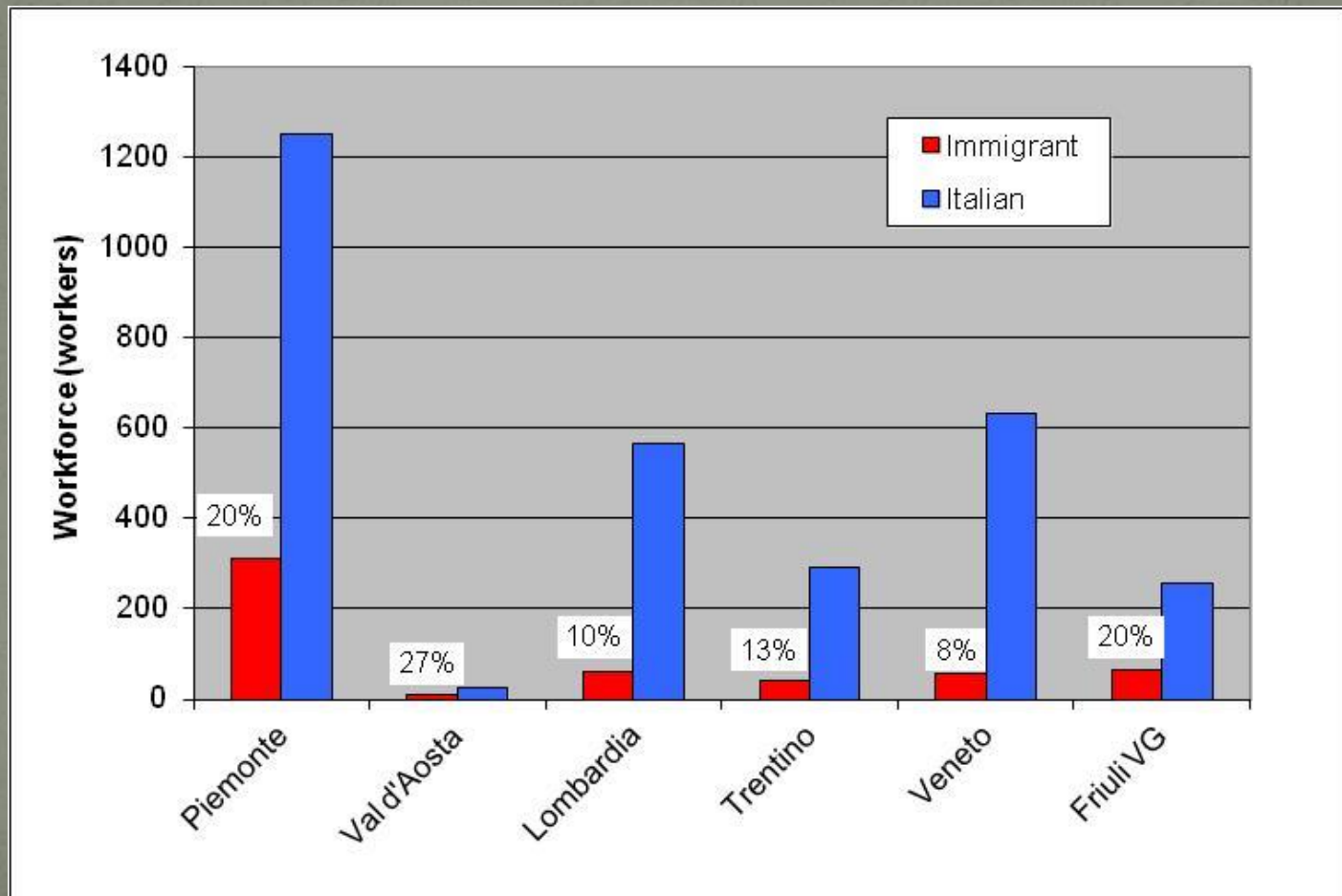
Company type

- Single owner: $\frac{3}{4}$ number, $\frac{1}{2}$ cut volume
1.8 workers vs. 4.8, 2000 m³/years vs. 5200



Workforce

Mean age of owner 45 years (PAT, 38 years), ♀ 4%



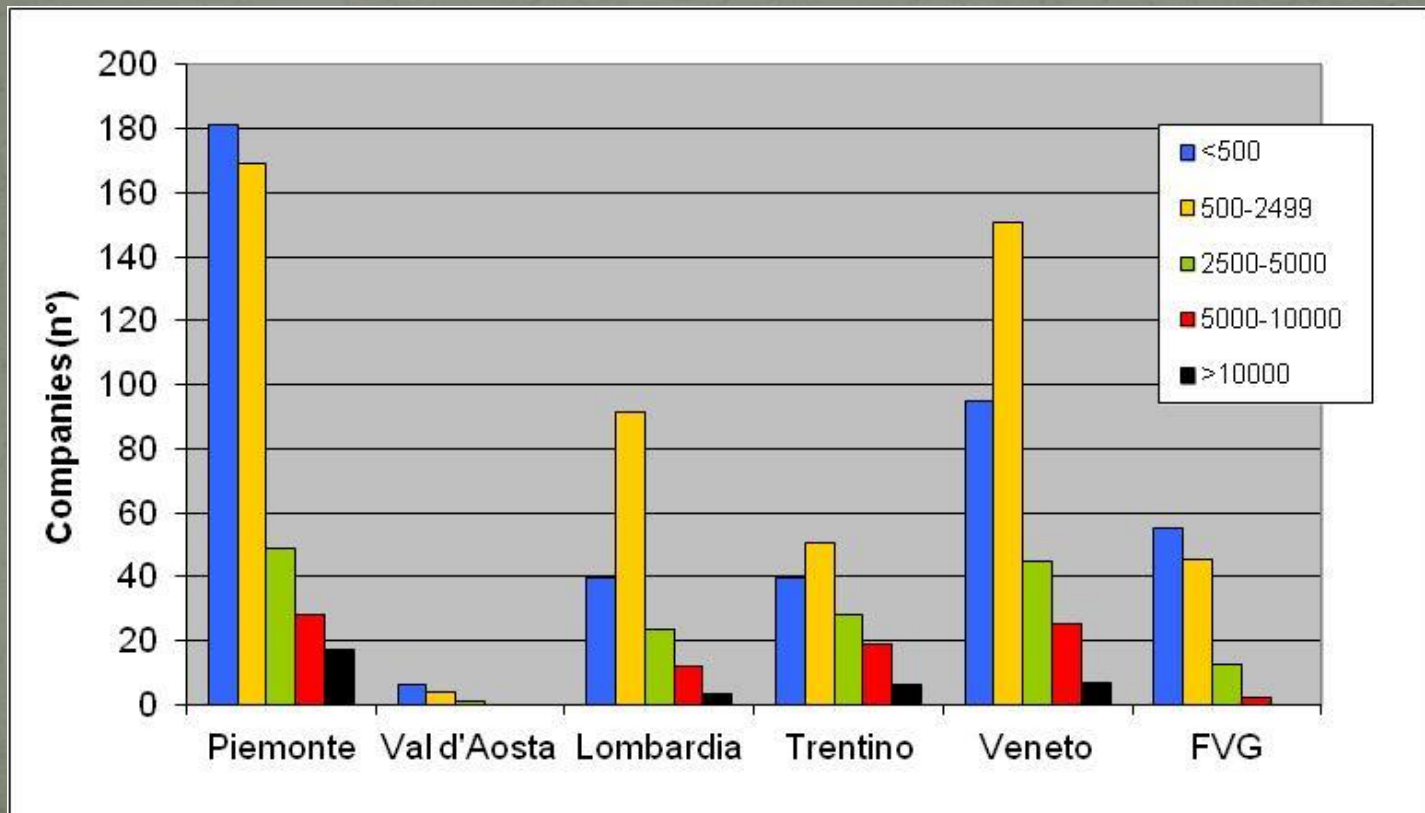
What do they cut

- Smallest sales in VdA, mostly private owners
- PAT Conifers, contracting

	Conifers	Hardwood	Sale size - m3			Private	Contracting
	%	%	Lower Q	Mean	Upper Q	%	%
Piemonte	NA	NA	NA	NA	NA	NA	NA
Val d'Aosta	45	70	118	312	507	65	60
Lombardia	45	57	253	447	642	NA	NA
Trentino	93	NA	NA	NA	NA	NA	67
Veneto	50	51	410	789	1169	38	40
Friuli VG	57	56	215	508	802	38	27
NORTHERN ITALY	57	55	300	603	907		

How much do they cut

- Piemonte & PAT ~ 4000 m³/a, rest 1-2000
- $\frac{3}{4}$ companies <2500 m³/a, 10% > 5000 m³/a



How do they cut

- Chainsaw and tractor
- 2/3 of chainsaws are manufactured by Stihl
- Tractors with winch and/or trailer



Farm tractors

- 1.5 farm tractors per company
- 12% tracked (20% in Veneto)
- Mean age: 11 years tired, 15 years tracked
- Mean power: 85 CV tired, 60 CV tracked
- 45% SDF, 20% CNH



Winches and trailers

- Winches : 3P & bolted, the latter the older
- Twin-axle trailers 6-12 t, with loader
- 10-15 years old (newer in PAT)
- Mostly IT brands: Bernardi, Galvagni, PZ etc.



Yarders

- Much competence, in all Regions
- 1 company in 4 is able and equipped
- Towers (35%) are newer (6 vs. 15 years)
- IT brands 70%
- Companies with yarder cut 4100 vs 2300 m³/a

		Piemonte	VdA	Lombardia	Trentino	Veneto	Friuli VG	N. ITALY
All yarders	n	60	8	105	73	68	45	359
Sled-mounted	n	34	6	78	39	45	28	230
Towers	n	26	2	27	34	23	17	129
Towers	%	43	25	26	47	34	38	36
Companies with Y	%	11	55	44	41	19	31	24
Age sled-mounted	anni	11	6	17	17	22	14	15
Age towers	anni	4	4	5	4	7	12	6

Advanced mechanization

- 70 companies (<6%), who cut 560k m³ (30%)
- Cut 4 times the grand mean (8200 vs. 2300 m³/a)...
...on sales that are not significantly larger
- Employ more workers (4.6 vs. 2.9)



Biomass

- 14% owns a chipper (2% FVG, 25% Piemonte)
- 1/3 chippers with capacity < 30 cm
- Trends towards drums (4 vs. 8 y, 37 vs. 23 cm)
- Industrial biomass managed by other companies

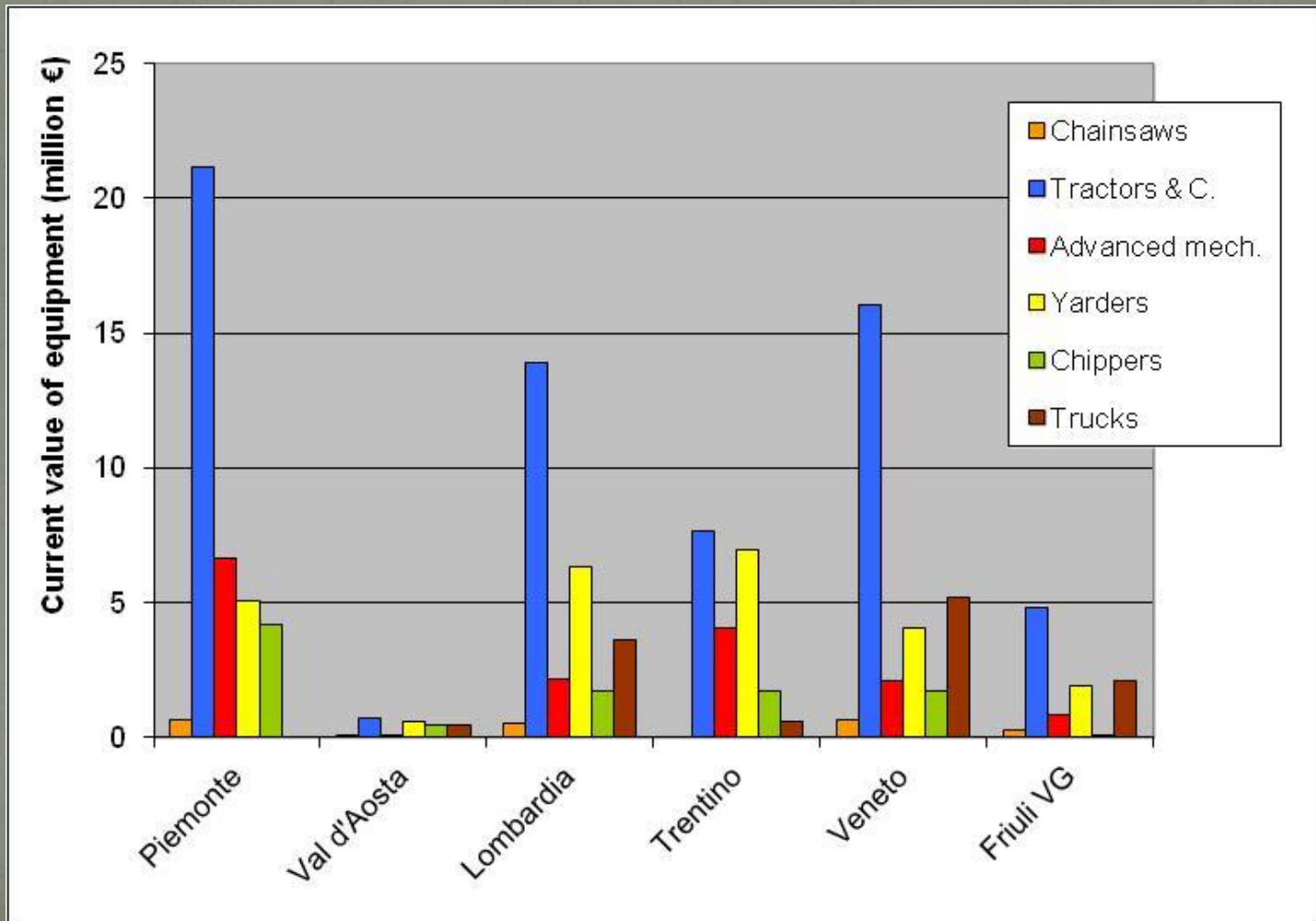


Hauling

- 1/4 equipped with trucks
- 8% PAT
- Old trucks (mean 13 years, UQ 20 years)
- 1/3 Iveco, 1/3 Man + Mercedes, 1/3 other



Capital invested in equipment

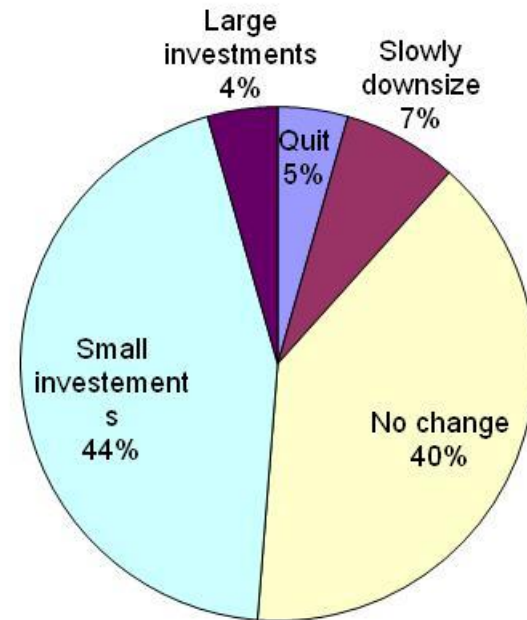
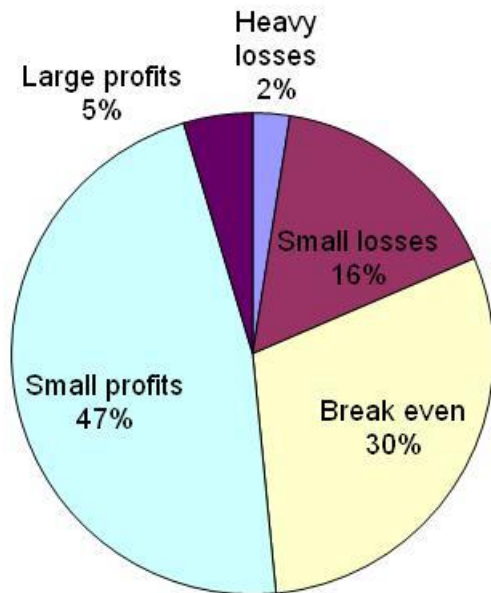


2 – Challenges and perspectives

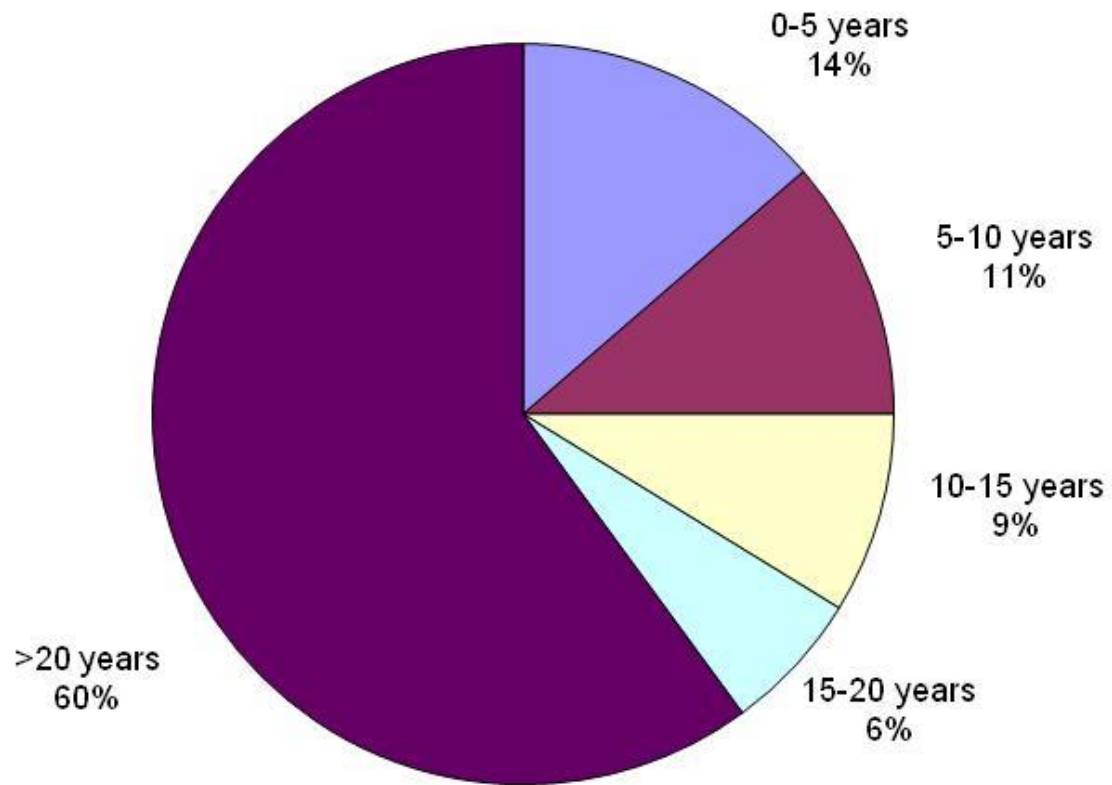


Revenues and plans

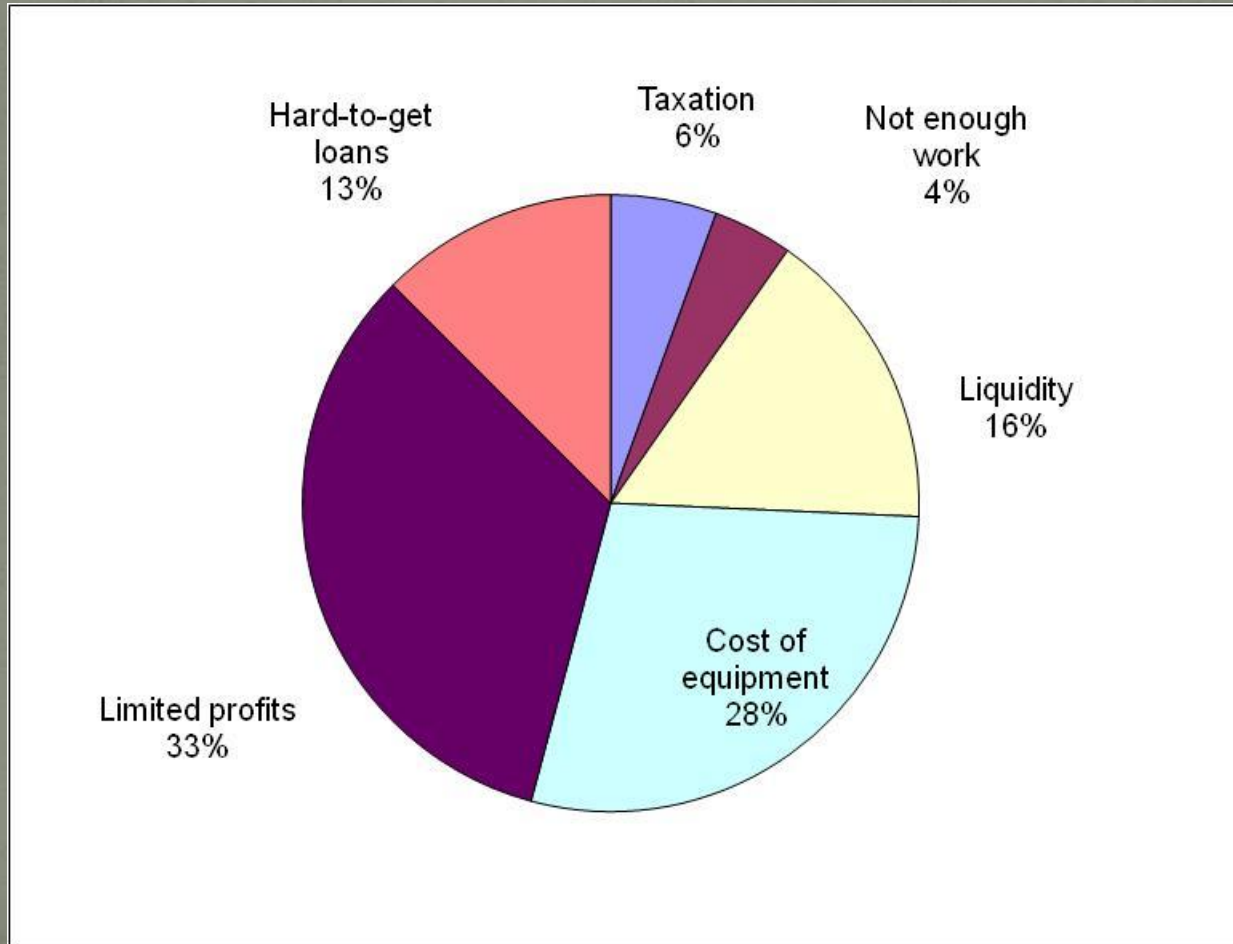
Things are not too bad...



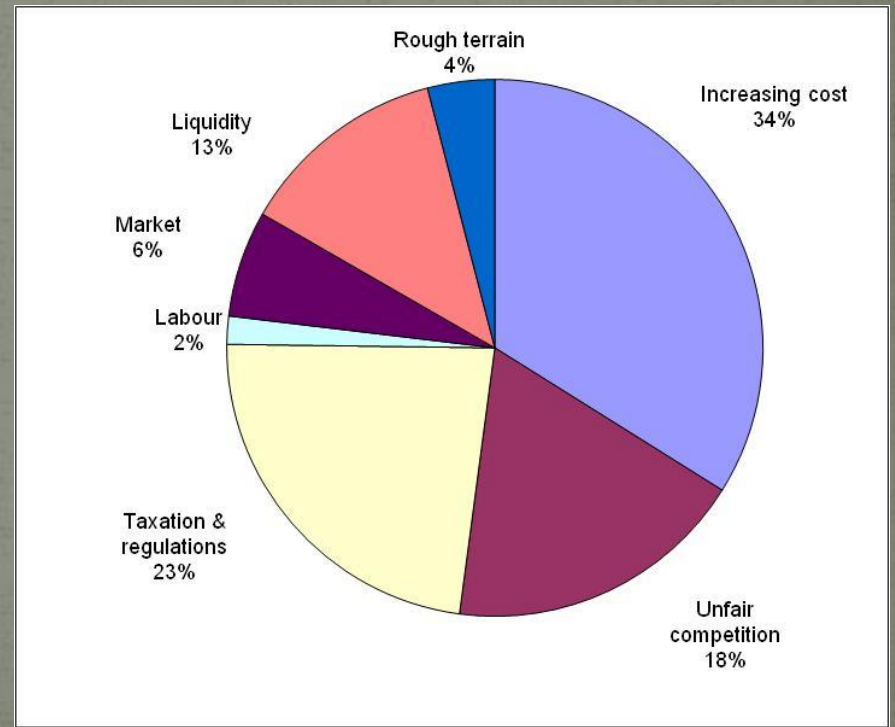
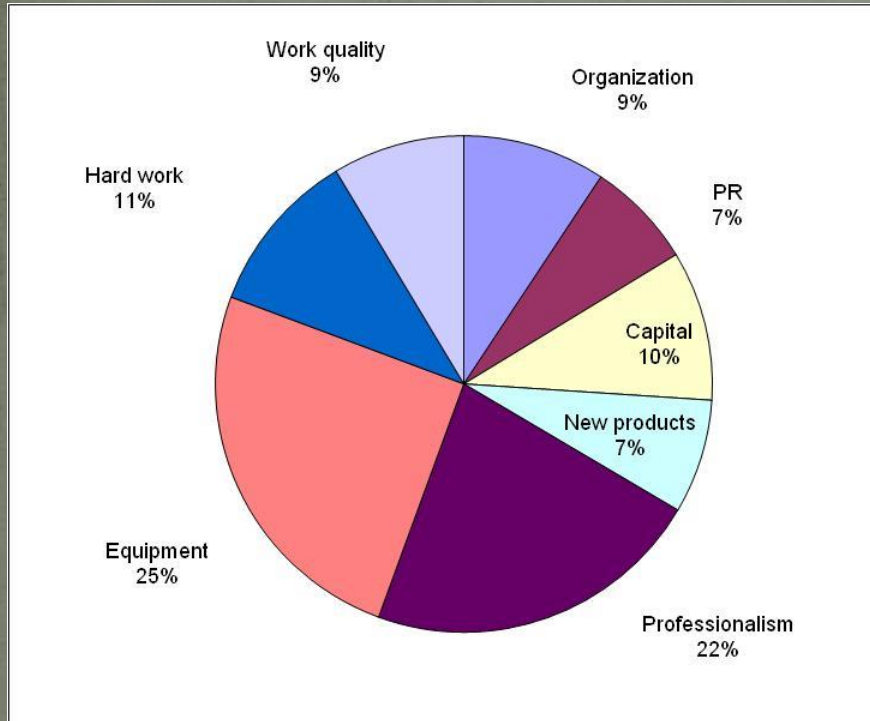
Continuity – a forecast



...But over half (55%) cannot modernize their fleet



Success factors and challenges



Regional differences

	West	Lombardy	PAT	East
FUTURE				
0-5 years	17%	9%	10%	15%
5-15 years	21%	13%	17%	32%
>15 years	62%	78%	73%	53%
CHALLENGES				
Unfair competition	19%	10%	20%	21%
Taxation & regulatic	20%	28%	23%	22%
Increasing cost	38%	38%	31%	29%
Liquidity	13%	8%	13%	16%
Market, labor etc.	10%	16%	13%	12%
OPPORTUNITIES				
Organization	9%	11%	6%	11%
PR	6%	9%	1%	13%
Capital	13%	2%	19%	4%
New products	14%	4%	3%	4%
Professionalism	18%	32%	20%	20%
Equipment	27%	21%	30%	21%
Hard work	8%	17%	6%	14%
Work quality	6%	3%	15%	13%

Contracting

- 2 groups: $\leq 50\%$ CT (11%) e $>50\%$ CT (90%)
- 101 respondents divided 75/25

	$\leq 50\%$	$>50\%$
Losses	23%	19%
Break even	37%	12%
Profits	41%	69%
Quit or downsize	20%	6%
No change	56%	23%
Invest and expand	24%	71%

Again on contracting

- indicator: equipment replacement capacity
(suggestive only: $p = 0.101$)

	$\leq 50\%$	$>50\%$
Can replace	35%	54%
Cannot replace	65%	46%



Work volume, m³/a

	<1000	1000-5000	>5000
Losses	14%	26%	14%
Break even	41%	18%	35%
Profits	45%	56%	51%
Quit or downsize	16%	16%	17%
No change	32%	60%	37%
Invest and expand	52%	24%	46%

Yarders

	Tractor	Yarder
Organization	6%	15%
PR	8%	7%
Capital	10%	4%
New products	7%	4%
Professionalism	19%	27%
Equipment	27%	23%
Hard work	13%	14%
Work quality	10%	6%



Other comparisons

- Public vs. private forests – nsd
- N° of workers – nsd
- Advanced mechanization - nsd



3 – Online database (Piemonte)



Albo Imprese ed Elenco Operatori forestali (AIFO)

- EU programmes Informa and InformaPlus
- Operational since 2010
- Updated and integrated: launch 2 October 2019
...now with VdA, Liguria, Rhone-Alpes & PACA



Simple interface

Group-Office x Albo imprese ed elenco operatori x Sistema Piemonte - Montagna - x +

Not secure | sistemapiemonte.it/aifo/authentication/LoginHomeAction.do

Cos'è Sistemapiemonte | Cerca **SERVIZI PER PRIVATI** **SERVIZI PER LA PA**

Sistemapiemonte

home_postAuth_liberoCittadini

sei in: sistema piemonte > montagna > **albo imprese e operatori forestali del Piemonte**

albo imprese e operatori forestali del Piemonte

home page Home page

albo imprese

- > ricerca azienda

operatori forestali

- > elenco operatori
- > preadesione ai corsi

guida al servizio

contatti

> Ricerca Azienda
Ricerca i dati di una o più aziende attraverso una ricerca semplice o avanzata. Dall'elenco dei risultati è possibile visualizzare e stampare i dati di dettaglio dell'impresa: Dati anagrafici, socio economici, strutturali, mezzi e attrezzature.

> Elenco Operatori
Ricerca degli operatori forestali inseriti nell'elenco regionale.

> Preadesione ai Corsi
Effettuare la richiesta di preadesione ai corsi di formazione forestale.

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14:01 22/08/2019

Find companies with specific competence, equipment etc. in a specific province

Cos'è Sistemapiemonte | Cerca

Sistemapiemonte

sei in: sistema piemonte > montagna > albo imprese e operatori forestali del Piemonte

albo imprese e operatori forestali del Piemonte

home page
albo imprese
> ricerca azienda
operatori forestali
> elenco operatori
> preadesione ai corsi
guida al servizio
contatti

Criteri di ricerca scelti

Denominazione	Partita IVA
N° albo	Cognome titolare
Nome titolare	
Provincia	Comune

Elenco aziende

8 risultati trovati (1 pagine)

N° albo	Cognome nome titolare	Denominazione Azienda	Comune	Attività svolte	Visualizza dettaglio
772	ALPE MATTEO	ALPE MATTEO	ALMESE (TO)	1. Tagli di utilizzazione in bosco e/o pioppeto 2. Miglioramenti forestali ovvero cure culturali, ripuliture, sfolli, tagli intercalari, diradamenti, difesa fitosanitaria 7. Gestione del verde arboreo (escluso quello urbano)	
625	CHIAMPO LUIGI	AMICO - SOCIETA' COOPERATIVA SOCIALE SIGLABILE AMICO - S.C.S.	ALMESE (TO) CAPRIE (TO) SANT'AMBROGIO DI TORINO (TO) VAIE (TO)	Altro 1. Tagli di utilizzazione in bosco e/o pioppeto 2. Miglioramenti forestali ovvero cure culturali, ripuliture, sfolli, tagli intercalari, diradamenti, difesa fitosanitaria 3. Viabilità forestale 8. Sistemazione idraulico forestali basate sui criteri della ingegneria naturalistica	
199	MORANDO CHRISTIAN	Azienda Agricola Fratelli Morando di MORANDO CHRISTIAN	ALMESE (TO)	Altro 1. Tagli di utilizzazione in bosco e/o pioppeto 7. Gestione del verde arboreo (escluso quello urbano)	
424	BLANDINO ALESSANDRO	BLANDINO ALESSANDRO	ALMESE (TO)	1. Tagli di utilizzazione in bosco e/o pioppeto 2. Miglioramenti forestali ovvero cure culturali, ripuliture, sfolli, tagli intercalari, diradamenti, difesa fitosanitaria 7. Gestione del verde arboreo (escluso quello urbano)	
929	BONINO MATTIA	BONINO MATTIA MANUTENZIONE AREE VERDI	ALMESE (TO)	1. Tagli di utilizzazione in bosco e/o pioppeto	

8 risultati trovati (1 pagine)

scarica elenco in formato excel

indietro nuova ricerca

guida_conferma_al...pdf ^ guida_conferma_al...pdf ^ guida_iscrizionii_al...pdf ^ guida_iscrizione_al...pdf ^ FULLTEXT01.pdf ^ T4E_HarvSysMapE...pdf ^ Show all x

14:03
22/08/2019

Find operators with specific training and competence

The screenshot shows a web browser window displaying the website 'Sistemapiemonte'. The page title is 'albo imprese e operatori forestali del Piemonte'. The user is logged in as 'LIBERO LIBERO'. The search filters are set to: Provincia: TORINO, Comune: selezionare, Ambito formativo: Gestione Forestale, and Qualifica: operatore forestale. The search results show 2 operators found:

Cognome nome	Comune residenza	Telefono	Mail	Unità formativa	Qualifica	Visualizza Dettaglio
BANDERA ALESSANDRO	SANTANTONINO DI SUSÀ (TO)	3226507087	gianni.bandera@alice.it	F1-Introduzione all'uso in sicurezza della motosega	operatore forestale	
BANDERA MASSIMILIANO	SANTANTONINO DI SUSÀ (TO)	3498542785	massimiliano.bandera@libero.it	F1-Introduzione all'uso in sicurezza della motosega	operatore forestale	

Apply for a training course

The screenshot shows a web browser window with the following elements:

- Browser Tabs:** Group-Office, Albo imprese e registro operatori, Sistema Piemonte - Montagna -
- Address Bar:** Not secure | sistemapiemonte.it/aifo/preadesioni/PreadesioneActionInit.do
- Page Title:** Forestali del Piemonte
- User Information:** Utente: LIBERO LIBERO | Soggetto giuridico: LIBERO
- Navigation Menu (Left):** home page, albo imprese, > ricerca azienda, operatori forestali, > elenco operatori, > preadesione ai corsi, guida al servizio, contatti
- Form Section: Preadesione**
 - Tabs:** Dati anagrafici (active), Scelta corso, Consenso al trattamento dati, Riepilogo
 - Text:** E' richiesto l'invio di una Preadesione per ogni unità formativa che si intende a frequentare. E' possibile inviare più preadesioni nel corso dell'anno. Note: la Preadesione, una volta inviata, non è più modificabile. A termine dell'invio viene comunque rilasciato un numero di ticket che si può utilizzare per comunicare eventuali modifiche al settore regionale competente. I campi contrassegnati con l'asterisco (*) sono obbligatori per salvare i dati.
 - Fields:**
 - Codice fiscale(*) [input] [cerca CF]
 - Cognome(*) [input]
 - Nome(*) [input]
 - Sesso(*) M F
 - Data di nascita(*) [calendar] (gg/mm/aaaa)
 - Nazionalità(*) Italia [dropdown]
 - Provincia(*) [dropdown] Comune(*) [dropdown]
 - Residenza: Provincia(*) [dropdown] Comune(*) [dropdown]
 - Indirizzo Ricerca via [input] [cerca via] (solo per i comuni piemontesi)
 - Via(*) [input] N° civico(*) [input] CAP(*) [input]
 - Tel./cell.(*) [input] / [input] Cell./tel. [input] / [input] Fax [input] / [input]
 - e-mail(*) [input] (in assenza inserire formazioneforestale@regione.piemonte.it)
 - Domicilio (Da inserire nel caso in cui la residenza non coincida con il domicilio): Provincia [dropdown] Comune [dropdown]
 - Indirizzo Ricerca via [input] [cerca via] (solo per i comuni piemontesi)
 - Via [input] N° civico [input] CAP [input]
 - Telefono [input] / [input]
 - Titolo di studio(*) [dropdown]

- Taskbar (Bottom):** 800px-Rhône-Alp...png, #RF001993.pdf, #RF001994.pdf, WBSmxrg.jpg, 3247.jpg, maxresdefault.jpg, Show all X
- System Tray (Bottom Right):** 09:51, 03/09/2019

Training in Piemonte



- The leader in Italian forest operator training
- 329 courses from 2007 to 2015
- 4935 participants
- 2500 unique individuals
- 420 achieved full qualification
- 8 M € investment
- ...more from 2015 to now!



Training Courses

Course	Topics	Duration	Outcome
F1	Introduction the chainsaw safety	4 hrs theory, 12 hrs practice	Prerequisite
F2	Safe use of chainsaw in processing operations	4 hrs theory, 20 hrs practice	Prerequisite
F3	Safe use of chainsaw in felling and processing operations	8 hrs theory, 32 hrs practice	Qualification
F4	Safe use of chainsaw in felling and processing operations: Advanced level	4 hrs theory, 36 hrs practice	Qualification
F5	Work and safe application of equipment in forest operations	4 hrs theory, 20 hrs practice	Qualification
F6	Work safety and health, injury prevention, emergency management, and enviromental and forestry rules	16 hrs theory	Qualification

Conclusions

- Know the sector first, then target improvements
- From regional to interregional
- Transborder to West
- An idea for East?
- Let me know your ideas/questions

