



CHANGES IN COMPETITIVENESS OF SELECTED CLUSTERS IN THE SLOVAK FOREST SECTOR

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SLOVAKIAN FOREST INDUSTRY

- after the year 2000 wood processing capacity in Slovakia increased significantly
- improved domestic wood consumption
- in 2008 - supplied 8.8 million m³ of timber
 - 2.2 mil. m³ was exported
- wood processing industry consumed - 8 mil. m³ of timber
- coniferous sawnwood production was over 2 mil. m³

METHODOLOGY - STEP 1

The indicators were calculated as annual values for the period 1998-2008

(into the three sub-periods lasting 3-4 years each)

Based on these definitions the main groups in the forest industry can be selected.

- coniferous industrial roundwood – IRWD (C),
- non- coniferous industrial roundwood – IRWD (NC),
- coniferous sawnwood – SNWD (C),
- non-coniferous sawnwood – SNWD (NC).

METHODOLOGY - STEP 2

To measure the competitiveness of the selected clusters the following indicators were used :

- Value of total export of a product group (*expval*)
- Value of total import of a product group (*impval*)
- The share of export volume in relation to domestic production (*exp/prod*)
- The share of import volume in relation to domestic consumption (*imp/cons*)

RESULTS - Calculated indicators of competitiveness for industrial roundwood clusters

Cluster	Indicator	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	
IRWD (C)	<i>exp val. (1000 \$)</i>	13084	26112	24821	22875	15348	19218	21396	73693	42655	60855	107785	
	<i>imp val. (1000 \$)</i>	922	311	156	22876	255	679	547	1609	2175	3570	9647	
	<i>exp / prod</i>	0,09	0,18	0,19	0,22	0,14	0,14	0,16	0,23	0,15	0,19	0,30	
	<i>imp / cons</i>	0,00	0,00	0,00	0,22	0,00	0,01	0,01	0,01	0,01	0,01	0,02	0,05
	<i>exp/prod-imp/cons</i>	0,09	0,18	0,19	0,00	0,14	0,13	0,15	0,22	0,14	0,17	0,25	
IRWD (NC)	<i>expval (1000 \$)</i>	18291	25709	29861	34085	30377	32745	34310	22154	42990	49438	39755	
	<i>impval (1000 \$)</i>	2799	3015	3088	34287	2905	4288	7235	2166	20667	28866	32182	
	<i>exp / prod</i>	0,20	0,26	0,34	0,34	0,29	0,21	0,17	0,11	0,19	0,18	0,16	
	<i>imp / cons</i>	0,07	0,06	0,06	0,34	0,06	0,06	0,08	0,02	0,12	0,12	0,18	
	<i>exp/prod-imp/cons</i>	0,13	0,20	0,28	0,00	0,23	0,15	0,09	0,09	0,07	0,06	-0,02	

RESULTS - Calculated indicators of competitiveness for industrial sawnwood clusters

Cluster	indicator	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
SWND (C)	exp val. (1000 \$)	78428	72554	71071	67351	75108	90173	71500	121812	151142	184091	192258
	imp val. (1000 \$)	2200	2448	3738	68024	5619	7938	8199	13074	23938	5906	906
	exp / prod	0,87	0,81	0,81	0,89	0,77	0,56	0,23	0,34	0,62	0,54	0,19
	imp / cons	0,17	0,10	0,16	0,89	0,15	0,07	0,02	0,02	0,08	0,20	0,07
	exp / prod - imp / cons	0,70	0,71	0,65	0,00	0,62	0,49	0,21	0,32	0,54	0,34	0,12
SWND (NC)	exp val. (1000 \$)	43915	46551	46752	47539	50716	61255	56362	63646	69234	79565	87434
	imp val. (1000 \$)	6550	9950	23000	28200 0	14000	15000	17000	15000	16000	16000	11775
	exp / prod	0,69	0,91	0,56	0,67	0,51	0,42	0,23	0,13	0,15	0,24	0,06
	imp / cons	0,05	0,20	0,11	0,67	0,06	0,05	0,04	0,03	0,03	0,05	0,02
	exp / prod - imp / cons	0,64	0,71	0,45	0,00	0,45	0,37	0,19	0,10	0,12	0,19	0,04

50 %

80 %

CONCLUSION

- industrial roundwood and sawnwood, both including coniferous and non-coniferous products are the main product clusters analysed in this paper coniferous industrial roundwood cluster the indicator of outward orientation
- they are significant similarities in evaluation of competitiveness
- coniferous sawnwood is the one showing the highest degree of outward competitiveness
- all analyzed clusters have a comparative advantage and indicate openness toward export markets

Thank you for your attention!

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