CONSUMERS OF WOOD BIOMASS
IN THE SLOVAK REPUBLIC

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THE WOOD BIOMASS MARKET IN SLOVAKIA MEETS DEMAND OF THREE MAJOR INDUSTRY CONSUMERS:

• PULP AND PAPER INDUSTRY
• PRODUCERS OF WOOD-BASED PANELS
• ENERGY SECTOR

MAJORITY OF DEMAND AIMED AT THE SAME INPUT ASSORTMENTS

IT CAUSES

PRESSURE ON THE PRICE
INSUFFICIENT AVAILABILITY OF INPUTS
CHANGES IN THE INPUT ASSORTMENTS INTO ABOVE MENTIONED SECTORS
<table>
<thead>
<tr>
<th>SECTOR</th>
<th>INPUTS</th>
<th>OUTPUTS</th>
<th>MAJOR PRODUCERS / Approx. annual consumption of pulpwood (2014)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PULP AND PAPER INDUSTRY</strong></td>
<td>➢ Pulpwood (dominantly non-coniferous)</td>
<td>➢ Paper</td>
<td>➢ Mondi SCP, a. s. in Ružomberok / 2 070 thousand m³</td>
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<td></td>
<td>➢ Wood residues</td>
<td>➢ Cellulose</td>
<td>➢ Bukóza Holding, a. s. in Hencovce / 300 thousand m³</td>
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<tr>
<td></td>
<td>➢ Pulpwood (dominantly coniferous)</td>
<td>➢ Energy from incineration of dissolved organic parts of wood</td>
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<tr>
<td><strong>PRODUCERS OF WOOD BASED PANELS</strong></td>
<td>➢ Wood chips</td>
<td>➢ Wood-based panels</td>
<td>➢ Bučina DDD, s.r.o. in Zvolen / over 232 thousand m³</td>
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<td></td>
<td>➢ Wood residues (e.g. scrapwood / slabwood, sawdust)</td>
<td></td>
<td>➢ Ikea Industry Slovakia s.r.o. in Malacky (Sweedspan Slovakia) / 375 thousand m³</td>
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<td></td>
<td>➢ Pulpwood (dominantly coniferous)</td>
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<tr>
<td><strong>ENERGY SECTOR</strong></td>
<td>➢ Fuelwood</td>
<td>➢ Production of electricity</td>
<td>➢ Dalkia, a.s. in Žiar nad Hronom / 130 thousand m³</td>
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<td></td>
<td>➢ Wood chips</td>
<td>➢ Production of heat</td>
<td>➢ Energy Edge ZC, s.r.o. in Žarnovica / 80 thousand m³</td>
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<tr>
<td></td>
<td>➢ Pulpwood</td>
<td></td>
<td>➢ Zvolenská teplářenská, a.s. in Zvolen / 60 thousand m³</td>
</tr>
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<td>➢ DAH Biomasa, s.r.o. in Bardejov and in Topoľčany / 60 and 45 thousand m³</td>
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</tbody>
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2010-2014

ENORMOUS DEMAND FOR **PULPWOOD** = LACK OF SUPPLY IN THIS PERIOD

COMPENSATION:
- IMPORT
- ASSORTMENTS OF HIGHER QUALITY CLASSES (ESPECIALLY SAWLOGS) ARE PROCESSED INTO CHIPS
CONSUMPTION OF WOOD BIOMASS **DOUBLED IN 2012** COMPARING TO 2010

- LACK OF SUPPLY MAGNIFIED BY EXPORT
- GROWTH OF THE WOOD BIOMASS PRICES ON THE SLOVAK MARKET
- SIGNIFICANT INFLUENCE HAD DEMAND AND PURCHASE POWER OF AUSTRIAN IMPORTERS
YEAR 2014

DECREASE OF CONSUMPTION IN 2014 HAVE CAUSED:

- Calamities across the Central Europe (saturation of wood market, e.g. in Austria)
- Project and technological problems of companies in energy sector
- Planned capacities of new established plants had not been achieved
- Some consumers finished operation (Smrečina HofaTEX, A. S. in 2013)
- Mild winter heating season (beginning of 2014)
COMPARISON OF THE PRICES 
OF PULPWOOD AND (ENERGETIC) WOOD CHIPS

**RECALCULATION OF PULPWOOD PRICE IN 2015:** 79,37 €/ATRO TON
Market price is 36 €/m³ (price of pulpwood) + 8 €/m³ (transport) + 6 €/m³ (chipping) = 50 €/m³ DAP

**RECALCULATION OF WOOD CHIPS PRICE IN 2015:** 84,55 €/ATRO TON
Market price is 46,5 €/t DAP with the moisture 45 %

Recalculated prices demonstrate that 5,18 € is saved by purchase of one ATRO ton of pulpwood instead of the same amount of wood chips.
CURRENT MARKET SITUATION

- OVERSUPPLY - NOT ONLY PULPWOOD, ALSO HIGHER QUALITY ASSORTMENTS – PROBLEMS TO PLACE SAWLOGS ON THE MARKET
- LOWER PRICES
- AUSTRIAN PULP MILL (HEINZEL GROUP) LAUNCHING PRODUCTION AFTER BRAKEOUT
- UKRAINE ANNOUNCED „STOP OF EXPORT“ FROM OCTOBER, 15TH