

Availability of round wood from Russia: solutions from Luke

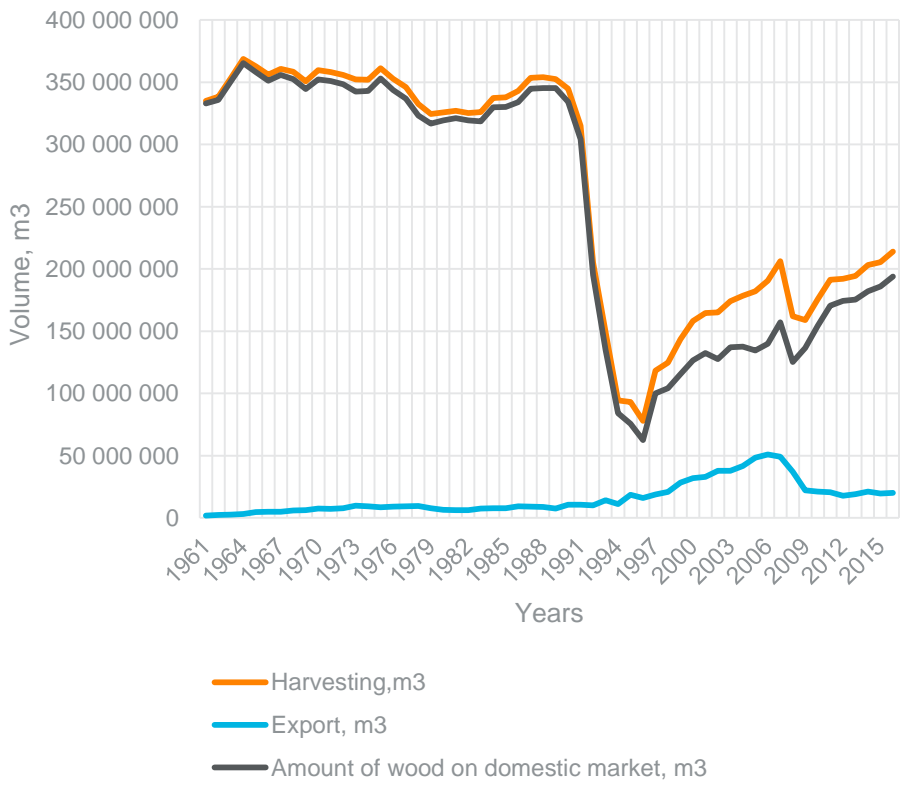
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With increasing harvesting the role of wood export is decreasing in Russia

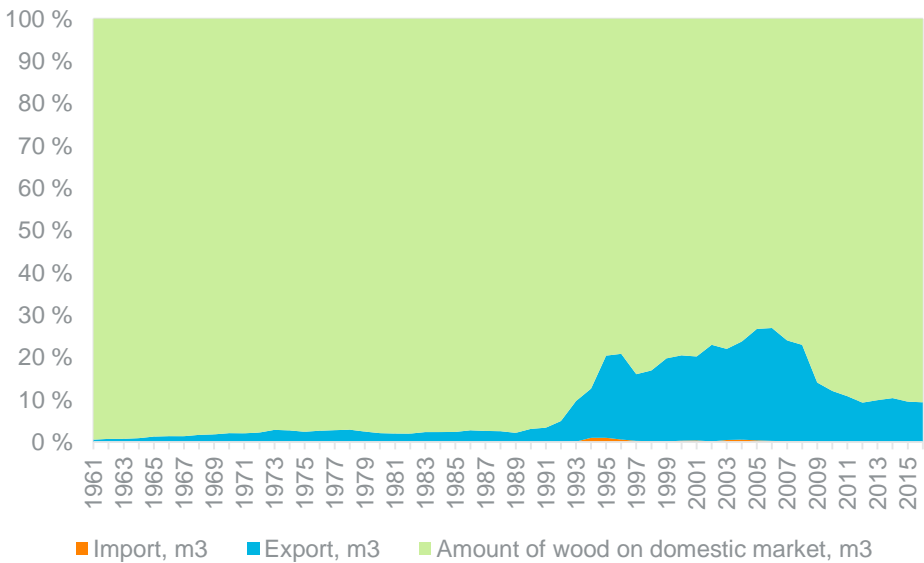
The size of domestic wood market is increasing from 1997 and reached 193 mln. m3 in 2016

The impact of round wood export on wood harvesting decreased from 26% (in 2006) to 9,38% (in 2017), close to the level of 1992

Wood harvesting, export, amount of wood on domestic market



Changing the role of export in round wood harvesting



Wood harvesting dynamics on federal districts level

Region	2012	2013	2014	2015	2016	2016/2015
Siberian FD	41 315	40 107	41 274	42 713	44 539	4,30%
NW Russian FD	37 666	38 754	40 796	41 737	41 172	-1,40%
Volga FD	15 922	16 407	16 669	16 997	17 657	3,90%
Far East FD	12 059	11 097	11 922	12 092	12 202	0,90%
Central FD	9 045	8 711	8 577	9 187	9 604	4,50%
Ural FD	5 174	4 219	3 613	3 438	3 343	-2,80%
Other FDs	469	447	456	432	395	-9,20%
Russia	121 752	119 836	123 380	126 703	129 007	1,80%

Benchmarking of sustainability of wood harvesting by companies

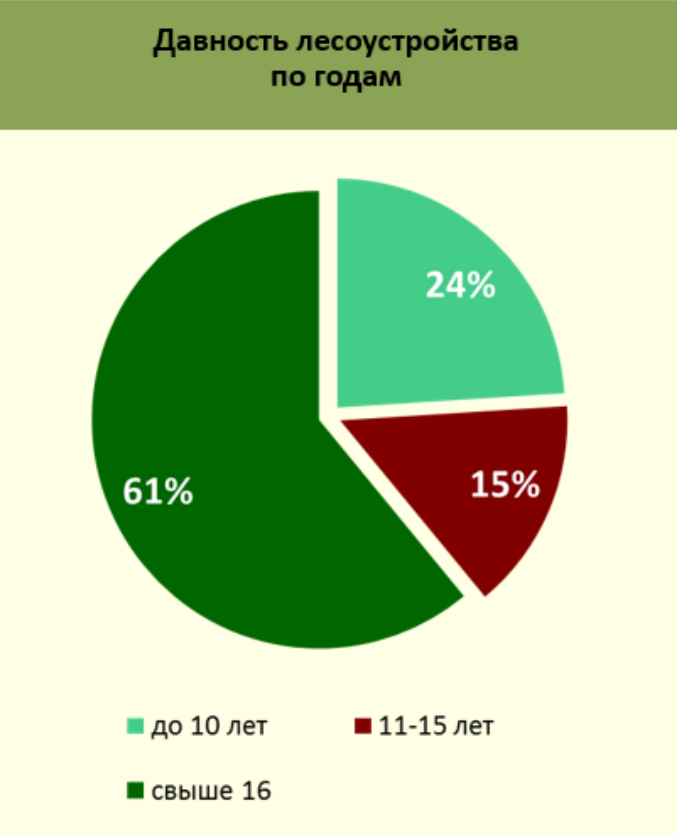
Company	Harvesting 2016, m3	Amount of forest resources, m3	Number of years for wood harvesting
1	170667	8157176	48
2	212231	33907790	160
3	624916	27545436	44
3	681178	63388755	93
4	3268153	2,18E+08	67
8	479706	17007632	35
9	528683,1	981873	2
10	124847	12388721	99
11	315136	24716428	78
Holdings			
1	14013804	3,2E+08	23
2	1997705	2,09E+08	104
3	680525	38196083	56
4	2932851	2,83E+08	96
5	8187575	2,77E+08	34
6	27248615	8,43E+08	31
7	3100632	1,49E+08	48
8	691045	99693244	144
9	3106198	1,85E+08	60

Problems in wood supply:

1. Current forest management model will force the companies to switch to the new areas or reduce the harvesting
2. Absence of spatial balance between wood consumption points and wood harvesting areas
3. Accessibility of forest resources
4. Overestimated annual allowable cut
5. Outdated forest inventory data

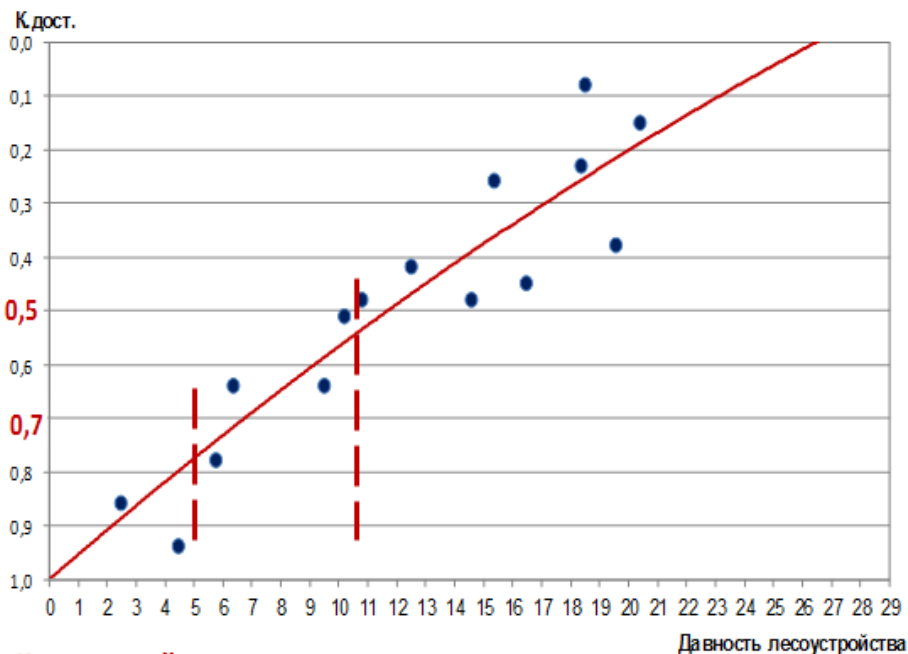
Official forest inventory data is not public and outdated for 76% of the forest areas

Age of forest inventory data, years



Relationship between the age of the data and uncertainties in decision making

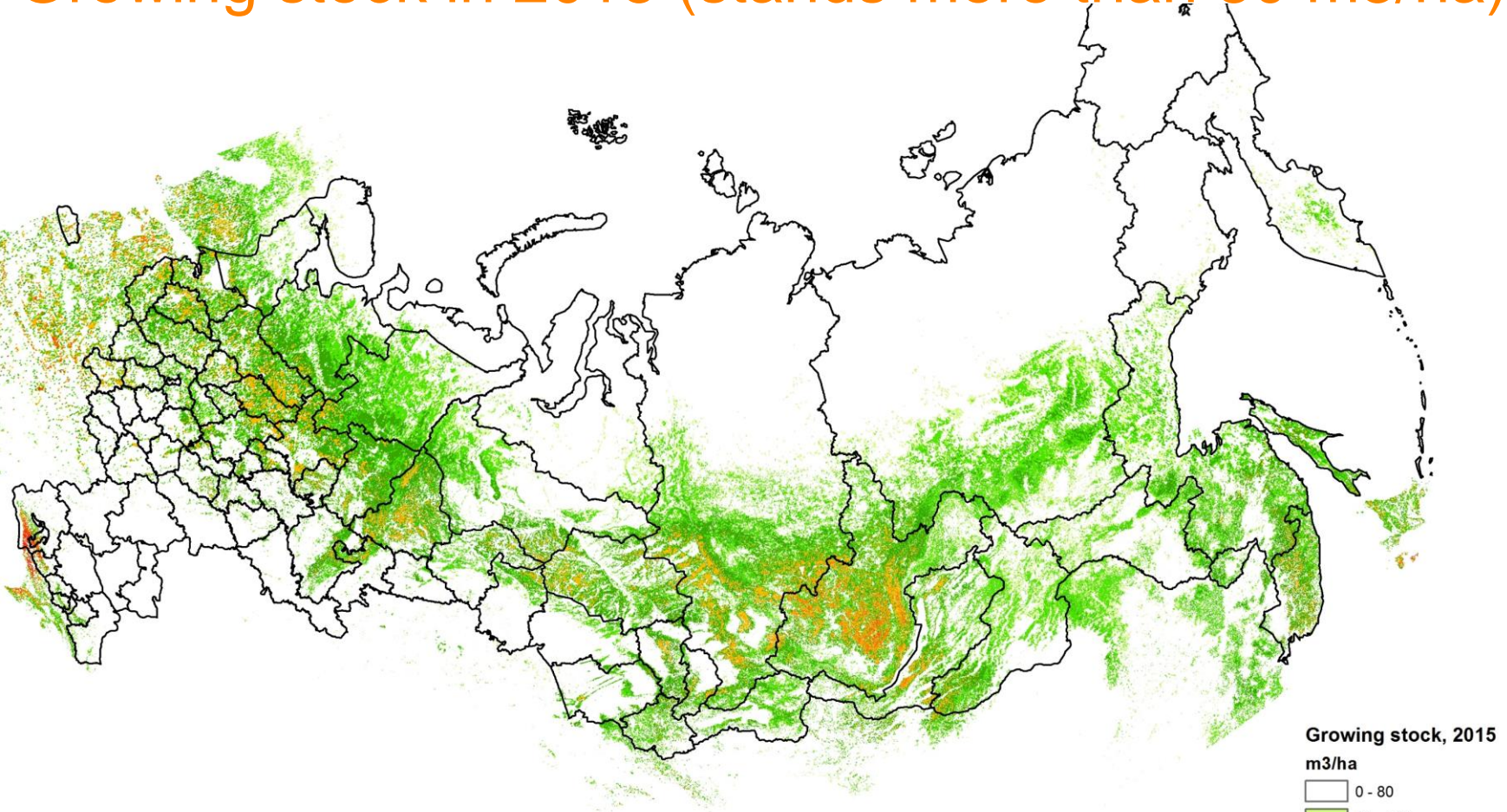
Достоверность материалов лесоустройства в зависимости от сроков давности таксации.
Ведение лесного хозяйства средней интенсивности и 15-30% уровнем использования расчетной лесосеки



Source: Roslesinforg, Manovich, 2014

Критический показатель достоверности:
для лесопользователей - 0,5
для ведения лесного хозяйства - 0,7

Growing stock in 2015 (stands more than 80 m³/ha)



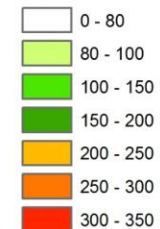
Maps of current state of forest resources in Russia for the year 2017 are available from Luke by request

Accessible growing stock (> 80 m³/ha, 1000 m from the road)



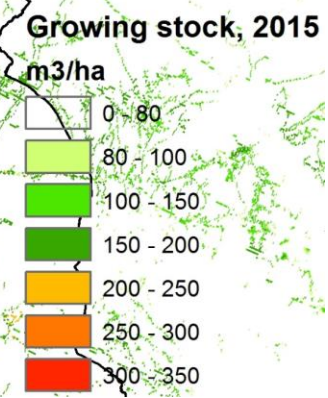
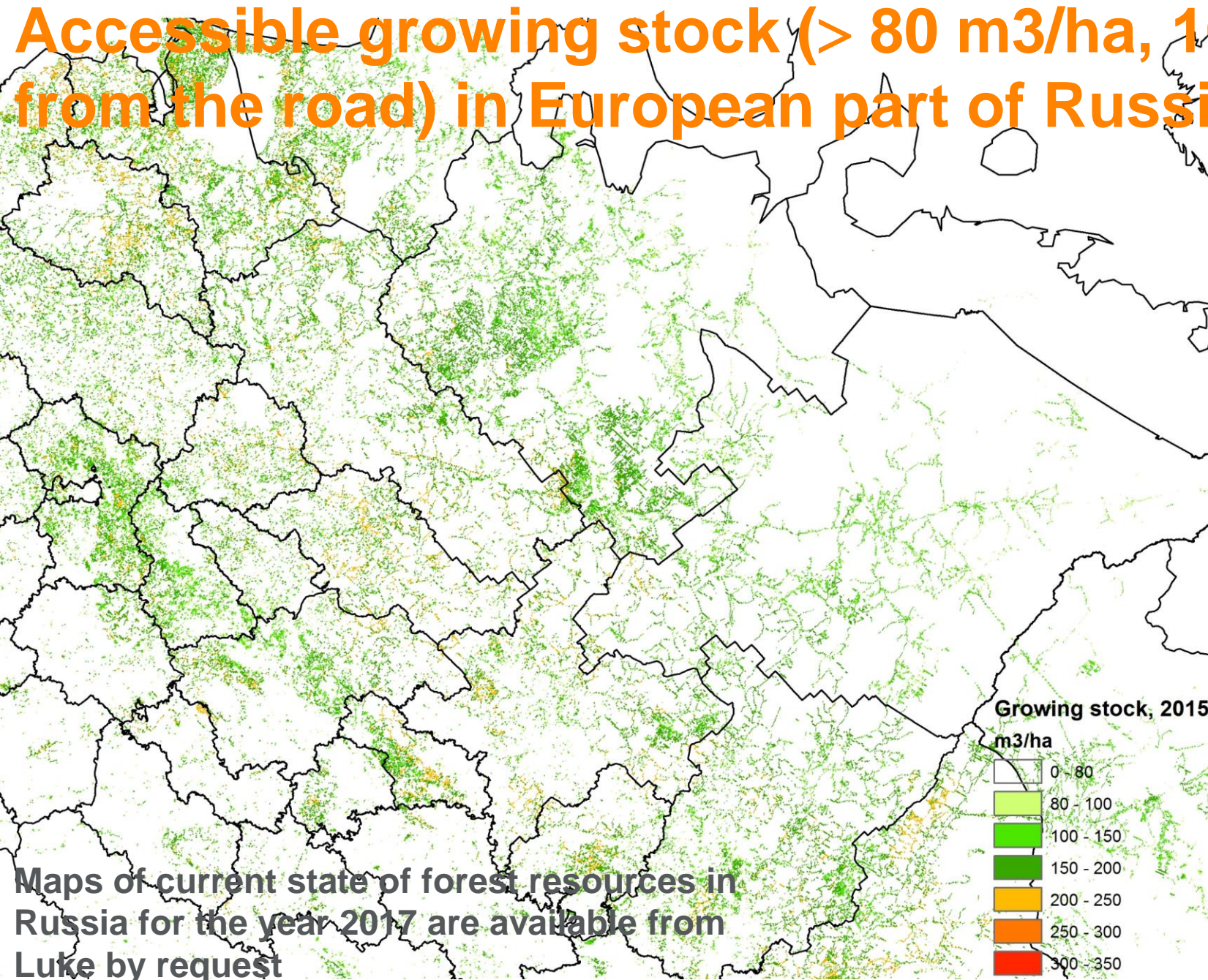
Growing stock, 2015

m³/ha



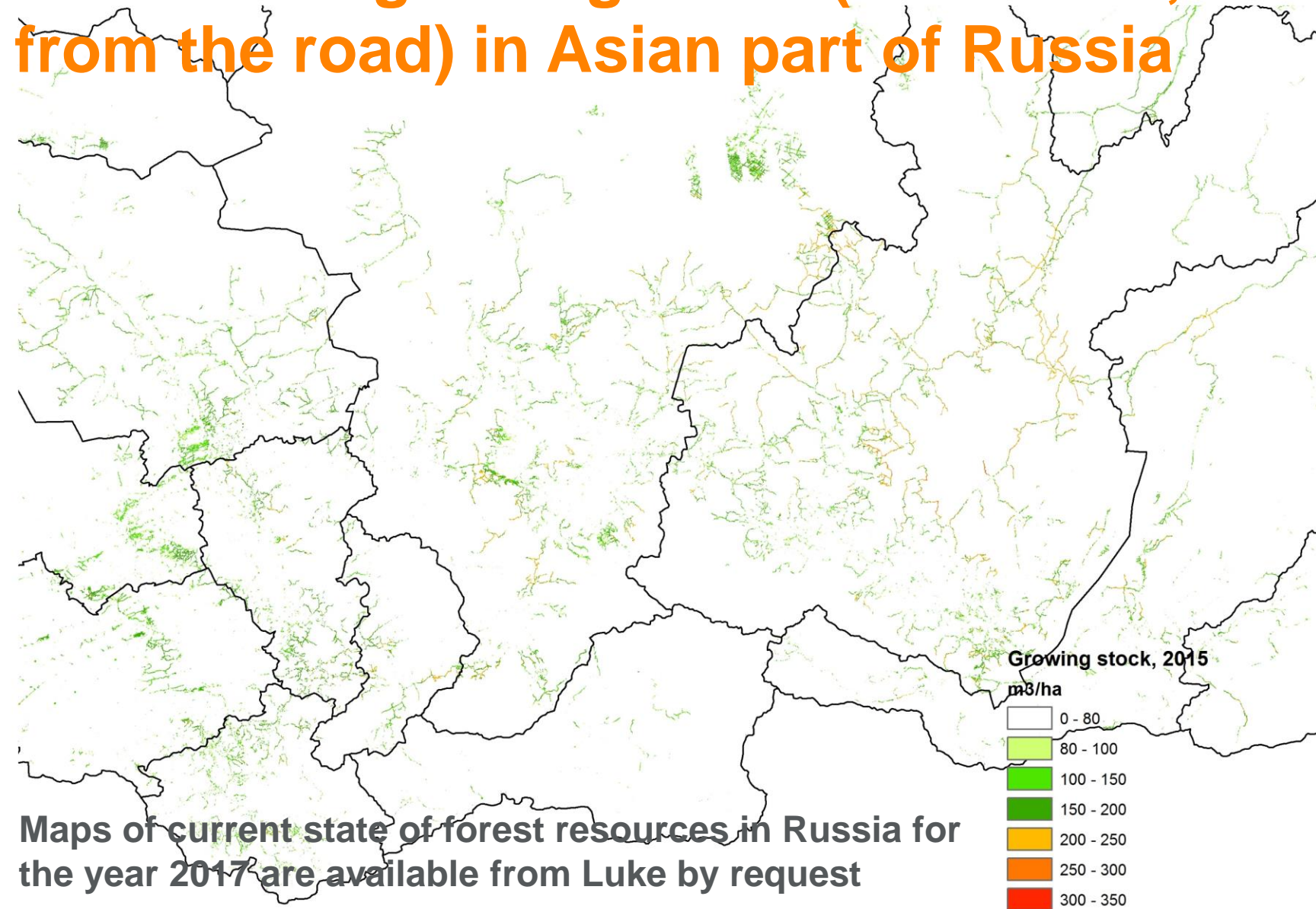
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Accessible growing stock (> 80 m³/ha, 1000 m from the road) in European part of Russia



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Accessible growing stock (>80 m³/ha, 1000 m from the road) in Asian part of Russia



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Luke's services and solutions wood procurement in Russia

- ✓ Reliable forest data
 - Online GIS
 - Regional forest inventories using satellite data
 - Forest management inventory using drones
- ✓ Wood harvesting planning
- ✓ Sustainability assessments
- ✓ Market analysis
- ✓ Know-how transfer and trainings
- ✓ Databases and forecasts

2017: Forest management inventory using drones for ZAO Karlis (FM Timber Oy) in Russian Karelia

