



FORRISK

Final Conference

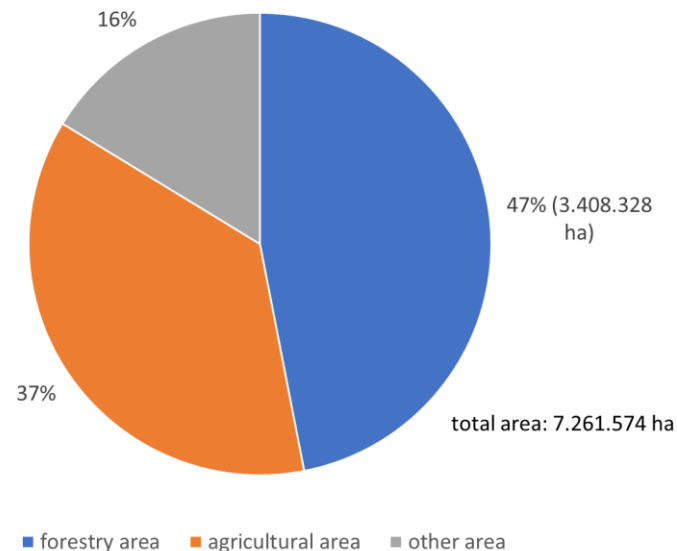
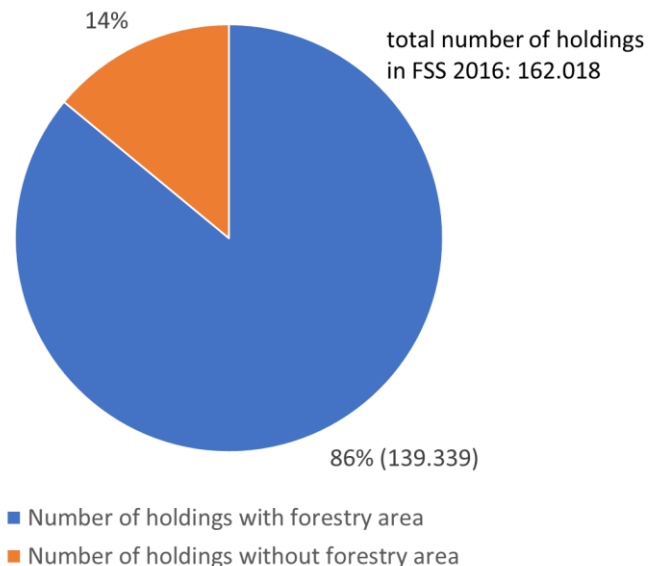
Ansfelden | 26.09.2022

Socio-economic issues - Austria

Gerhard Gahleitner. Federal Institute of Agricultural
Economics, Rural and Mountain Research



Structure of holdings



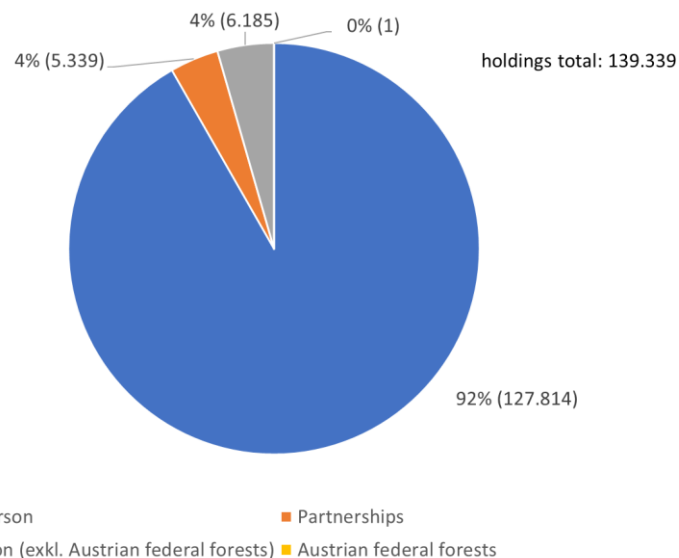
Sources: Statistics Austria. Farm Structure Survey 2016. Austrian Federal Forests.

Other area = unproductive area, waters, unused agricultural area, buildings, Landscape elements and moors

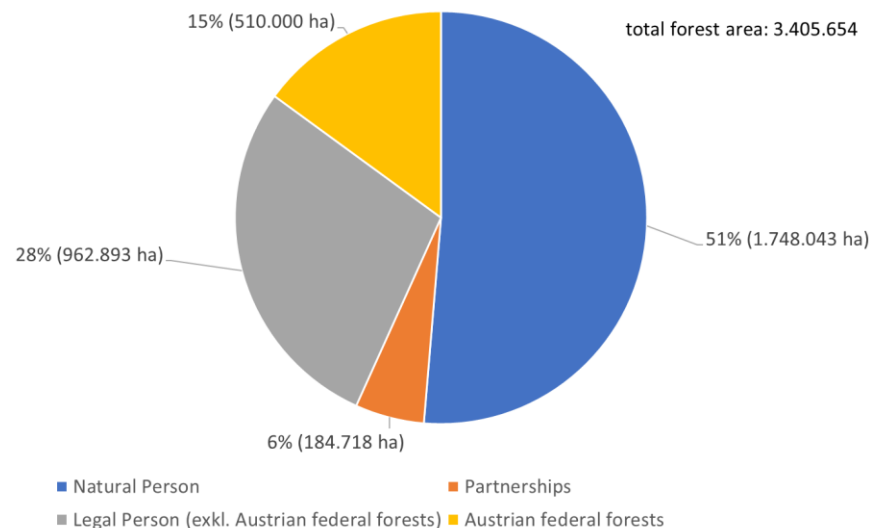


Structure of holdings with forest area

Share of holdings (Number) by Legal form



Share of Forest area by Legal form



Sources: Statistics Austria. Farm Structure Survey 2016. Austrian Federal Forests.



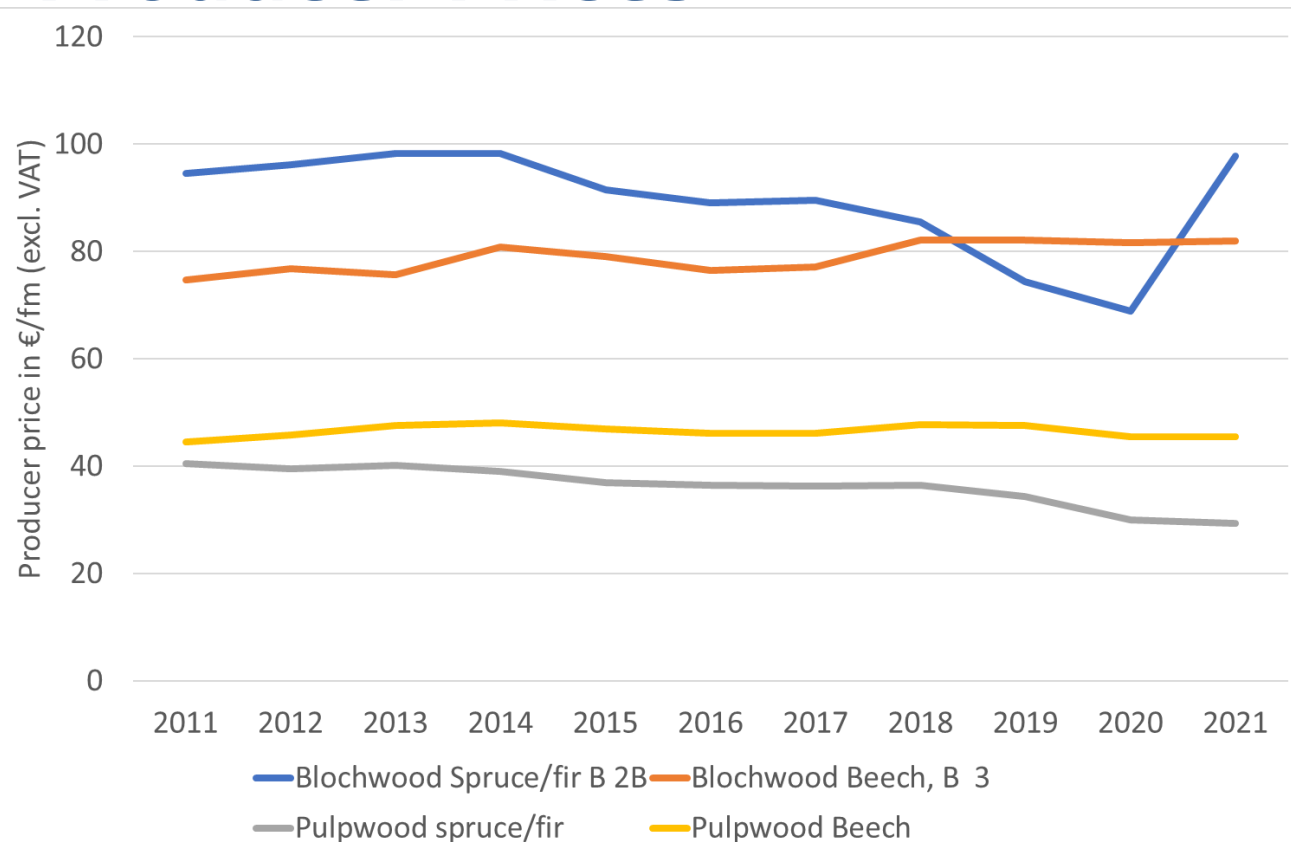
Structure of holdings with forest area

| Size of holding Legal form | Share of number <50 ha | Share of number 50- <250ha | share of number ≥250 ha | total | Share of hectares <50 ha | Share of hectares 50-<250ha | share of hectares ≥250 ha | total | Average size per holding hectares |
|---|------------------------------|----------------------------------|-------------------------------|-------|--------------------------------|-----------------------------------|---------------------------------|-------|--|
| Natural Persons | 96,47% | 3,17% | 0,36% | 100% | 57,44% | 22,69% | 19,87% | 100% | 13,7 |
| Partnerships | 94,24% | 4,02% | 1,74% | 100% | 21,61% | 13,72% | 64,67% | 100% | 34,6 |
| Municipalities | 64,30% | 22,98% | 12,72% | 100% | 6,40% | 15,82% | 77,78% | 100% | 318,4 |
| public bodies (e. g. Church, Schools) | 79,84% | 12,18% | 7,98% | 100% | 6,31% | 6,44% | 87,25% | 100% | 372,0 |
| Other legal Person (excl. Austrian federal forests) | 61,25% | 27,05% | 11,69% | 100% | 7,38% | 22,53% | 70,09% | 100% | 139,5 |
| Total (except Austrian Federal Forests) | 95,02% | 4,10% | 0,88% | 100% | 38,69% | 20,41% | 40,90% | 100% | 20,8 |

Source: Statistics Austria. Farm Structure Survey 2016. Own calculations by BAB



Producer Prices

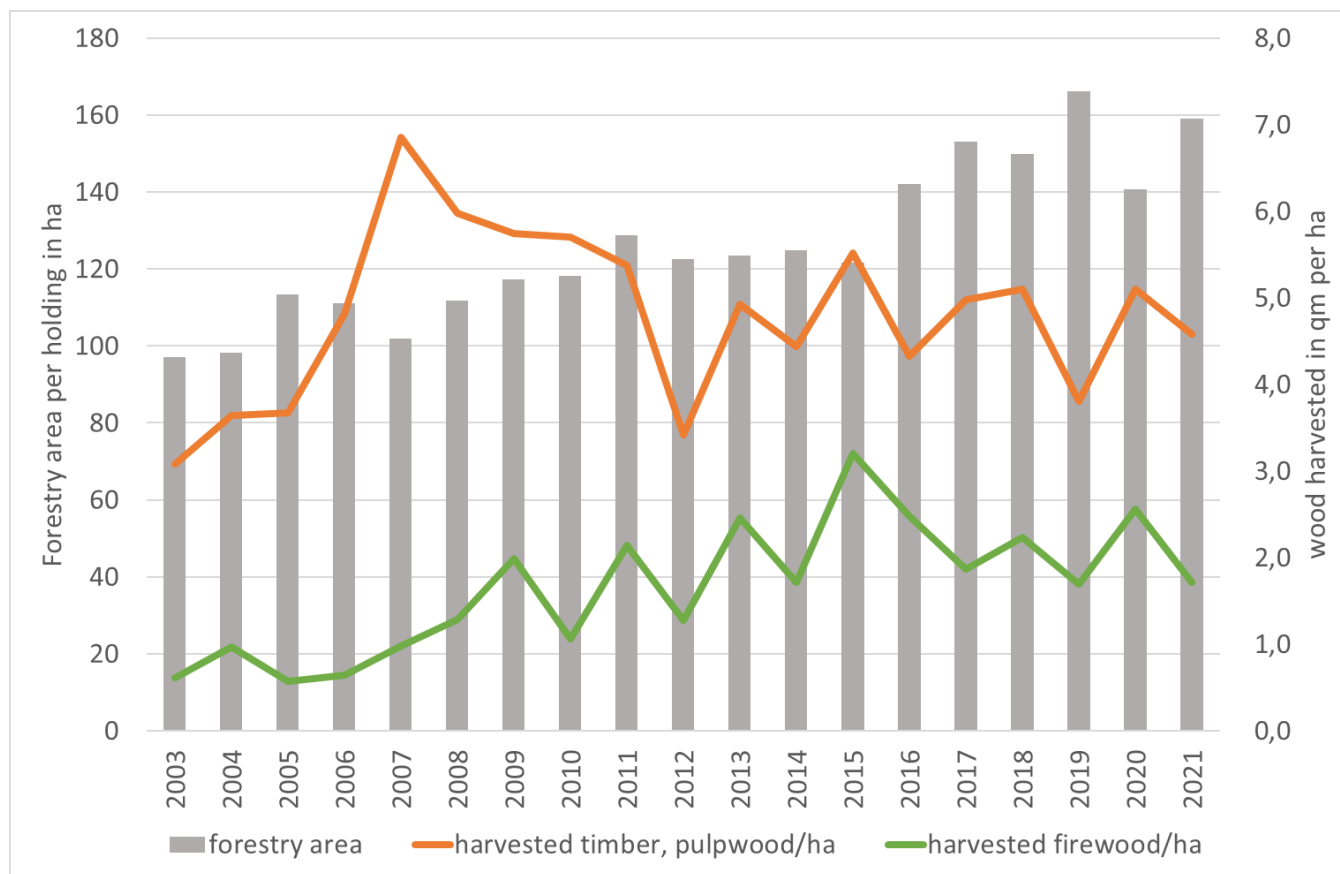


- Decrease of producer prices for blochwood spruce/fir from 2015
- Sharp price increase for blochwood spruce and fir 2021

Source: Statistics Austria. Producer prices



Specialists forestry (forestry SO > 2/3 total SO) – results of accountancy datas



- Increase of forestry area per holding
- Harvested timber, pulpwood highest in 2007.
- Increase of harvested firewood per hectare

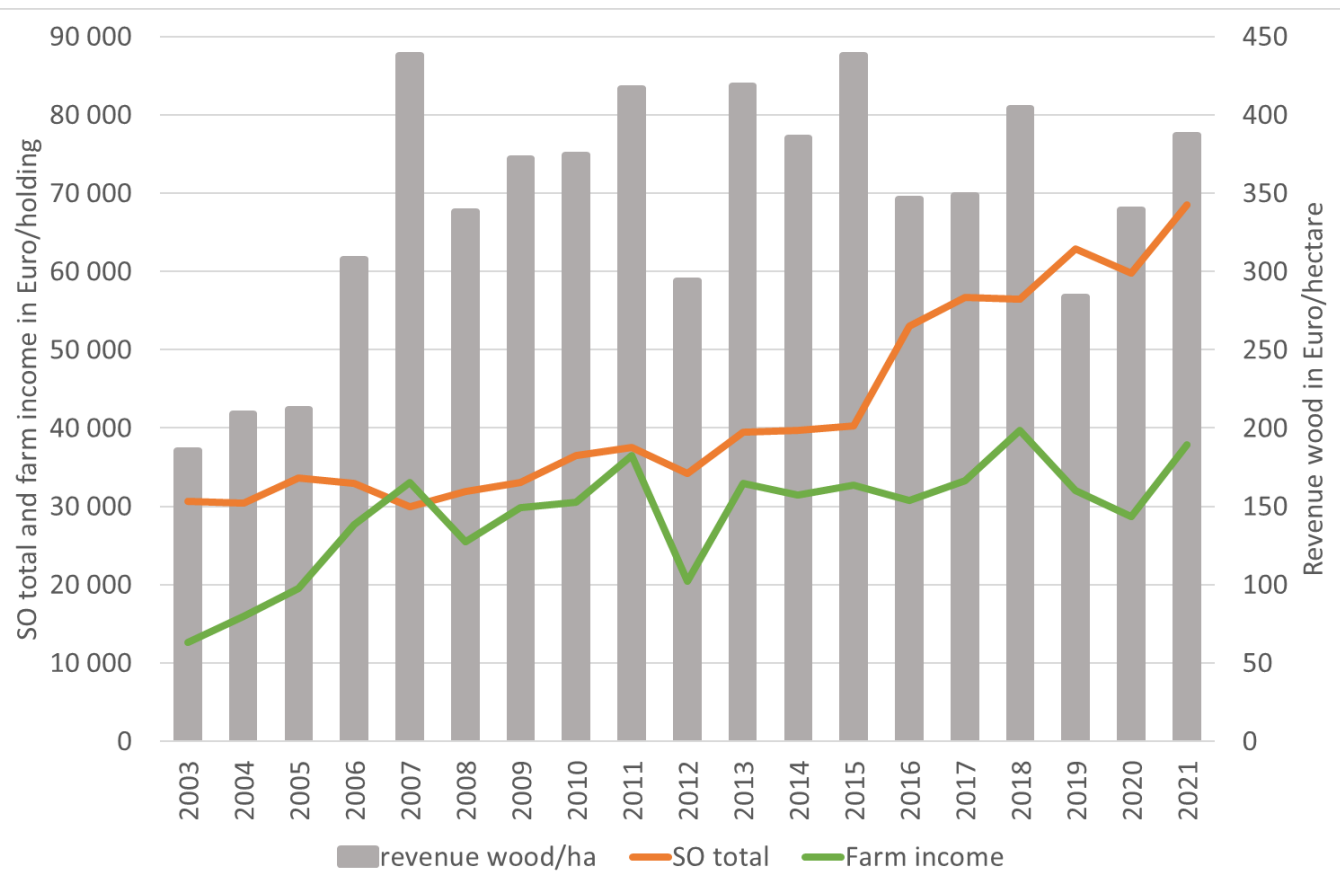
Source: LBG Österreich. Efiles 2003 – 2021. BAB

Socio-Economic issues_AT

Project co-funded by the European Union



Specialists forestry (forestry SO > 2/3 total SO) – results of accountancy datas



- Increase SO total per holding
- Revenue forestry per ha between 190 Euro (2003) and 390 Euro (2007, 2015)
- More or less sideways movement of farm income since 2007
- Increase of farm income in 2021 compared to previous year

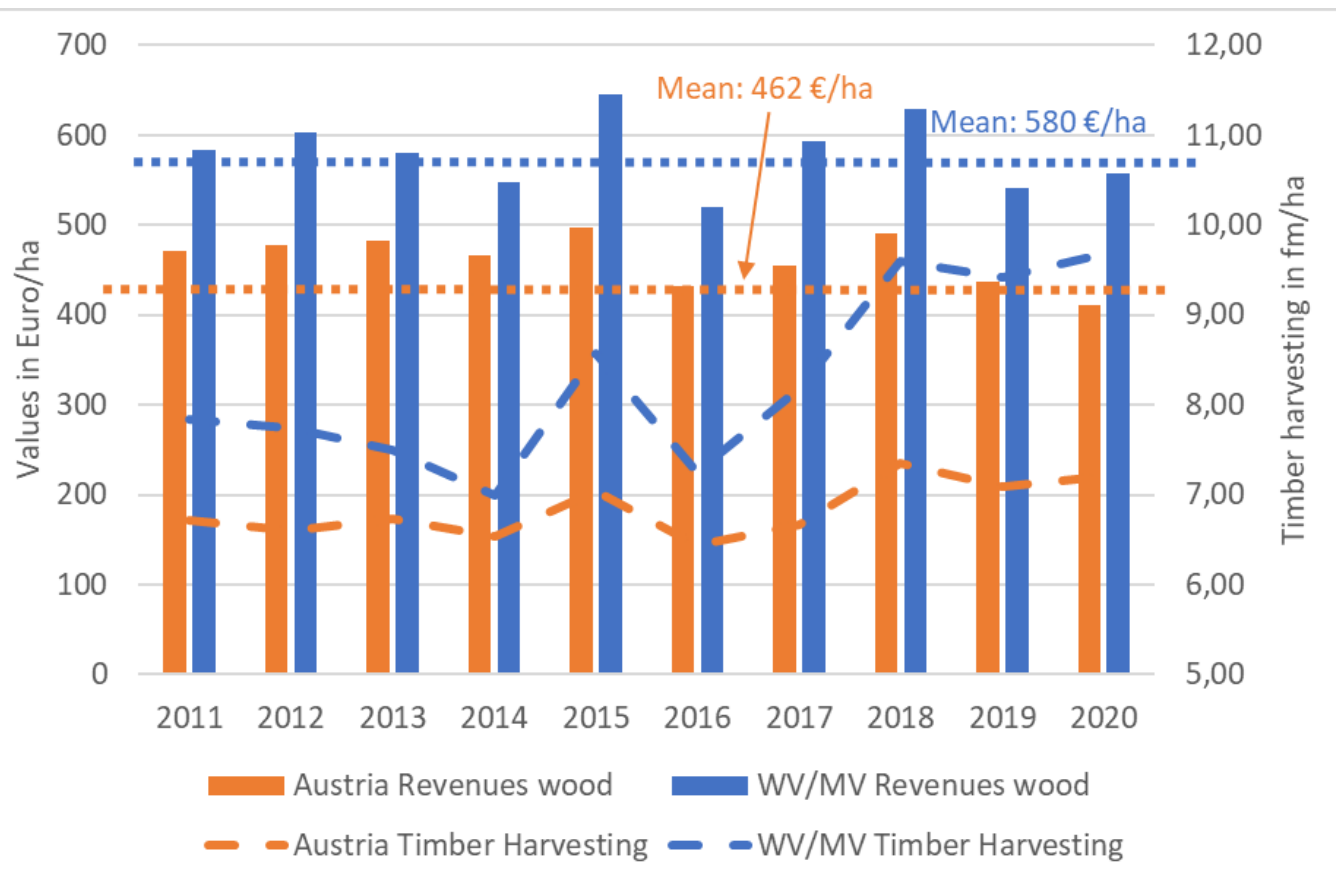
Source: LBG Österreich. Efiles 2003 – 2021. BAB

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Revenues wood, Timber harvesting – large forestry for Austria total and Wald- und Mühlviertel

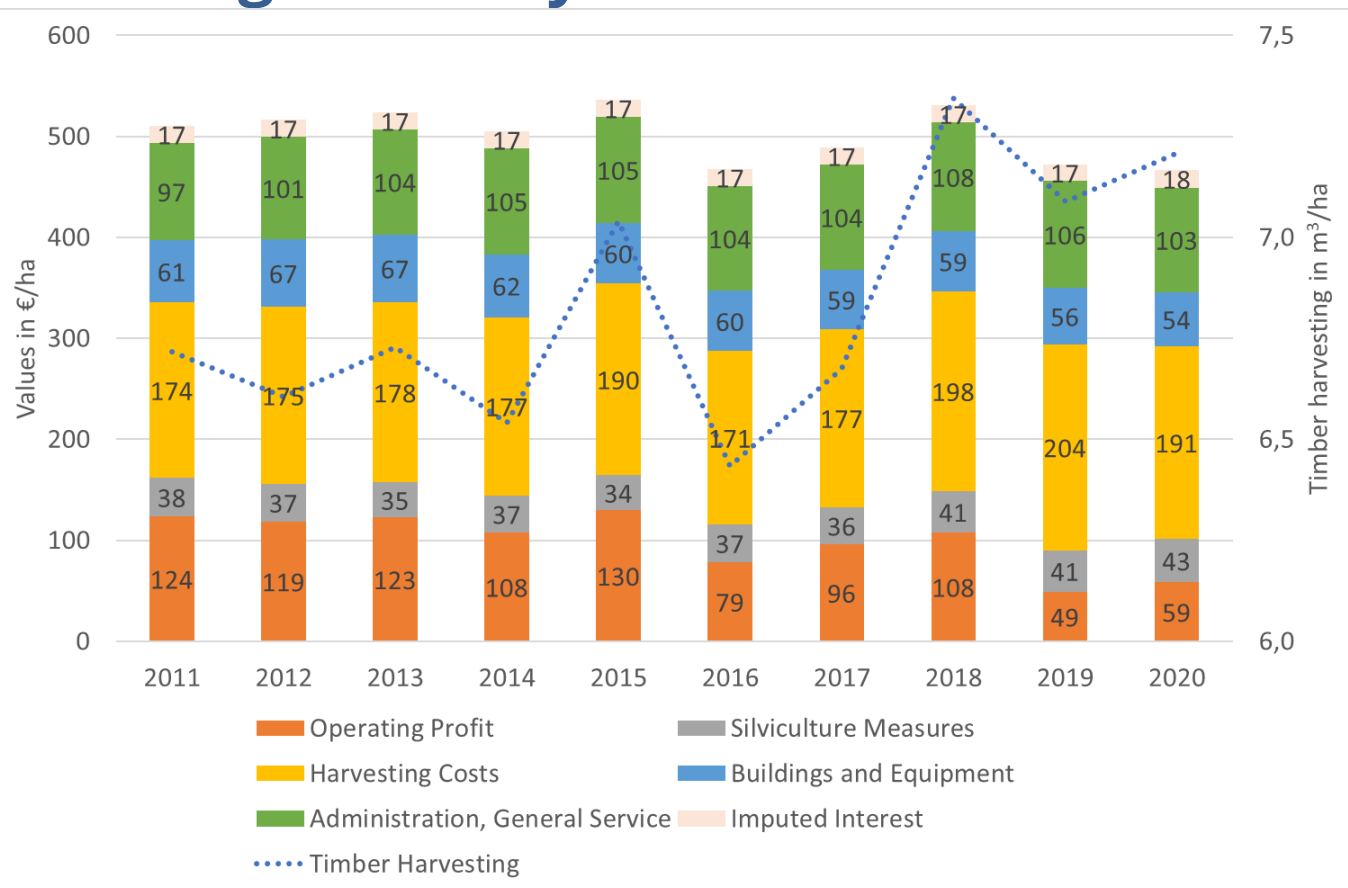


- Increase of harvested timber per ha from 2017 especially in Wald- und Mühlviertel
- Revenue wood in 2019 and 2020 below average despite higher harvested timber in Wald- und Mühlviertel caused by lower prices for blochwood spruce/fir

Source: Land&Forstbetriebe. Österreichischer Forstbericht. Own illustration



Composition of costs and operating profit per hectare for large forestry for Austria total



- Harvesting costs in years 2018 to 2020 highest
- Operating profit in years 2019 and 2020 lowest despite higher timber harvested

Source: Land&Forstbetriebe. Österreichischer Forstbericht. Own illustration



Gross Margins of forestry farms in Austria and Wald- und Mühlviertel – Mean 2019 and 2020

| | Figure | Unit | Austria | Wald- und Mühlviertel |
|---|-------------------------------|-------------|--------------|-----------------------|
| | Timber harvesting | fm/ha | 7,15 | 9,54 |
| | Timber revenue | €/ha | 418,1 | 533,4 |
| - | Timber harvesting costs | €/ha | 175,1 | 210,9 |
| = | Gross Margin I | €/ha | 243,0 | 322,4 |
| + | Revenue skidding plants | €/ha | 4,4 | 2,3 |
| - | costs skidding plants | €/ha | 31,4 | 25,4 |
| = | Gross Margin II | €/ha | 216,0 | 299,3 |
| + | Revenue 1. Production stage | €/ha | 9,7 | 15,4 |
| - | Costs Silviculture | €/ha | 42,1 | 60,4 |
| = | Gross Margin III | €/ha | 183,5 | 254,3 |
| + | Revenue buildings & equipment | €/ha | 12,4 | 10,5 |
| - | Costs buildings & equipment | €/ha | 23,7 | 28,1 |
| = | Gross Margin IV | €/ha | 172,2 | 236,8 |
| + | Other revenues | €/ha | 3,2 | 5,8 |
| - | Administration Costs | €/ha | 104,5 | 131,6 |
| = | Gross Margin V | €/ha | 70,9 | 111,0 |

- Higher Gross margins I – V of holdings in Wald- und Mühlviertel – mainly caused by higher harvested timber
- Gross Margin V:
 - Austria total: 70,9 Euro/ha
 - Wald- und Mühlviertel: 111 Euro/ha

Source: Land&Forstbetriebe. Österreichischer Forstbericht. Own illustration



Gross Margins of forestry farms in Austria and Wald- und Mühlviertel – Mean 2019 and 2020

| Figure | Unit | Small forestrys *) | Large forestrys | Federal Austrian forests |
|--------------------------------------|------------------------|--------------------|-----------------|--------------------------|
| Timber revenue | €/m ³ | 55,5 | 59,7 | 69,2 |
| Timber harvesting costs | €/m ³ | 47,3 | 27,6 | 47,2 |
| Harvesting costs free revenue | €/m³ | 8,2 | 32,1 | 22,0 |
| Silviculture Costs | €/m ³ | 6,9 | 5,9 | 7,8 |

*) Timber harvesting costs includes imputed wages for non-salaried employees

Source: BMLRT. Kleinwalderhebung; Land&Forstbetriebe. Österreichischer Forstbericht. Own illustration

- Highest timber revenue are achieved by Federal Austrian Forests
- Lowest timber revenue by small forestry
- Lowest harvesting costs free revenue by small forestry (please note: timber harvesting costs includes imputed wages for non-salaried employees)