

How to increase the success rate of the wood sector?

01.04.2025

Stefan Torno
Bavarian Forestry and Wood Cluster Initiative

Bavarian Forestry and Wood Cluster Initiative.

Overview.



The forestry and wood sector was included in the **cluster policy of the Bavarian State Government** (Cluster Offensive Bavaria) in 2006 under the leadership of the Bavarian State Ministry of Economic Affairs, Regional Development and Energy and the Bavarian State Ministry of Food, Agriculture, Forestry and Tourism.

The aim of the Forestry and Wood Cluster Initiative in Bavaria is **to network science, industry and politics** to develop the economic and scientific potential, boost innovation, strengthening forestry and create a higher added value for wood and wood products.

Bavarian Forestry and Wood Cluster Initiative.

Who we are.



- Team of 6 employees
- 2 cluster spokespersons (industry + research and development)
- Advisory board (20 experts)
- Support by 2 ministries
- Regional initiatives, networks and working groups

Bavarian Forestry and Wood Cluster Initiative.

What we do.



- Networking
- Dissemination of knowledge
- Innovation projects, e.g. use of hardwood in construction and development of wood-based bioeconomy
- Specialist, industry and networking events
- Image work for the forest and wood industry (proHolz Bayern)
- Support of technical and political authorities, action / working groups and initiatives

Bavarian Forestry and Wood Cluster Initiative.

Focus.



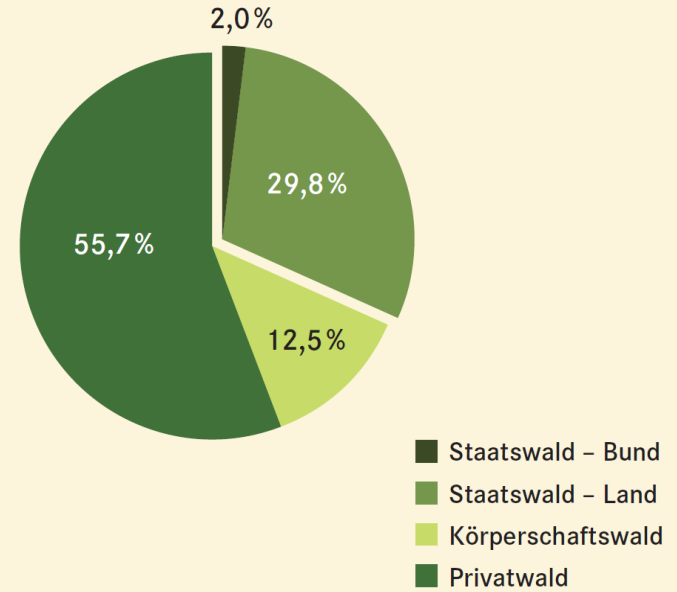
- Timber construction
- Wood based bioeconomy
- Circular economy
- New products and applications, e.g. for future tree species
- Establishment of new industrial production in Bavaria
- New players within the forestry and wood cluster and related / new economic sectors
- ...

Forest in Bavaria.

Facts and figures.

- Forest area: ~ 2.6 million ha / ~ 37 % share
- Ownership structure:
 - 56% private forest > 700,000 owners
 - 30% state forest
 - 12% corporate forest
 - 2% federal forest

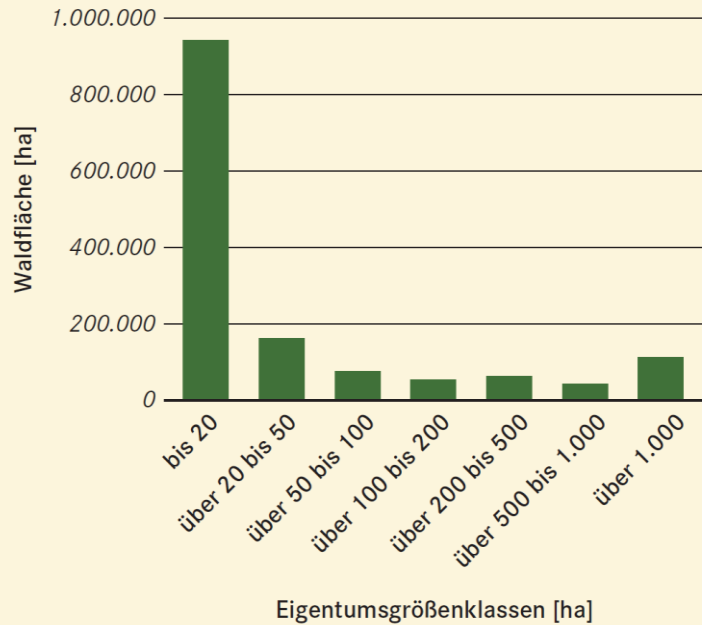
Verteilung des Waldbesitzes in Bayern



Facts and figures.

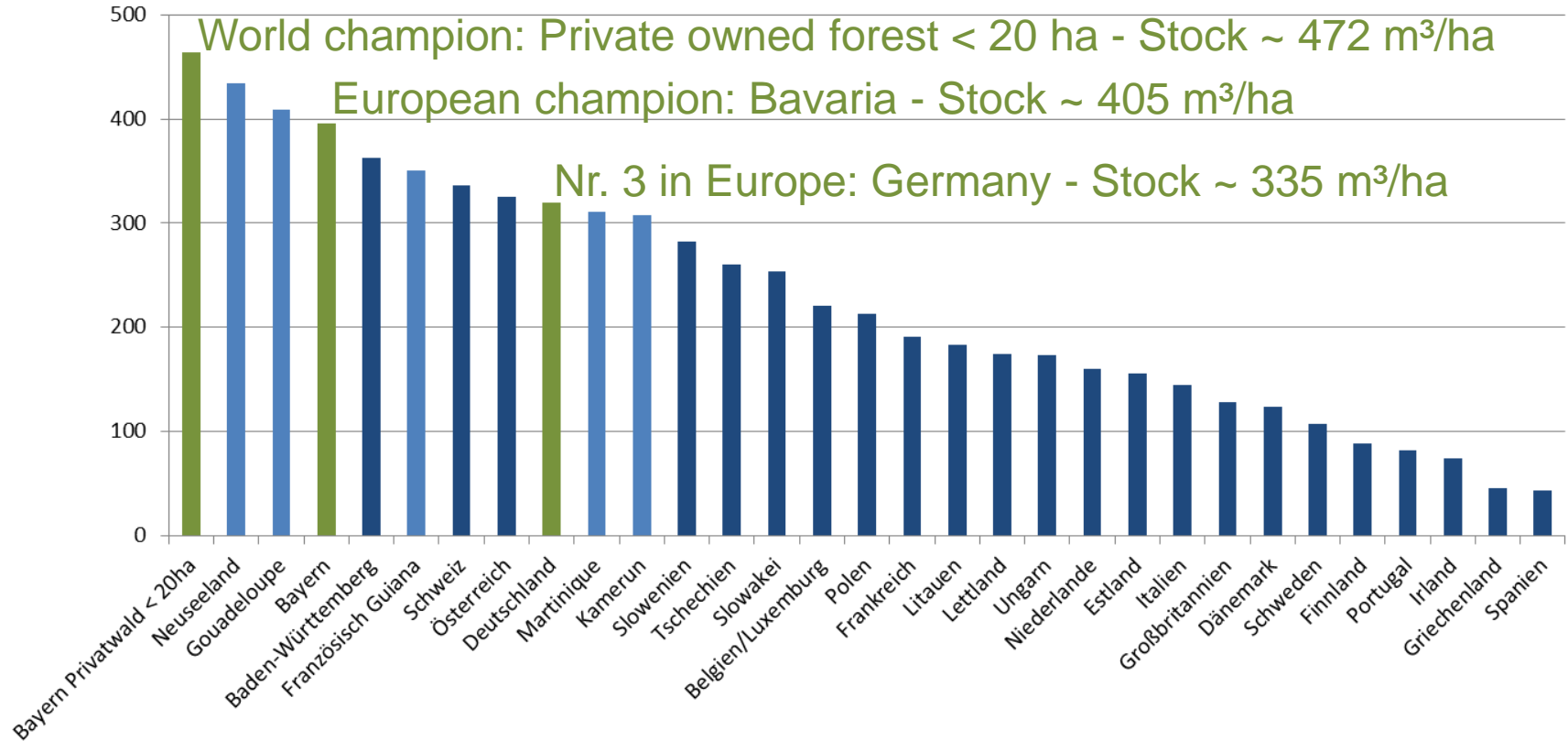
Private forest: Area by size.

Waldflächenverteilung im Privatwald



Facts and figures.

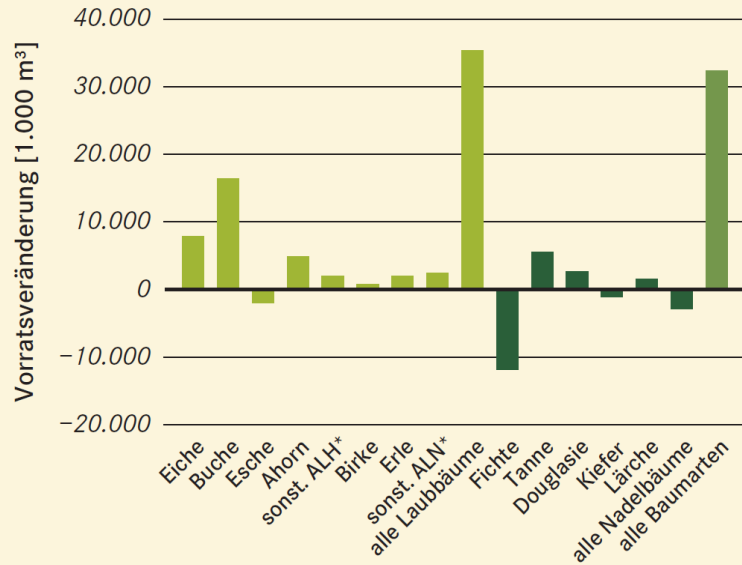
International comparison of stock.



Facts and figures.

Change in stock and growth.

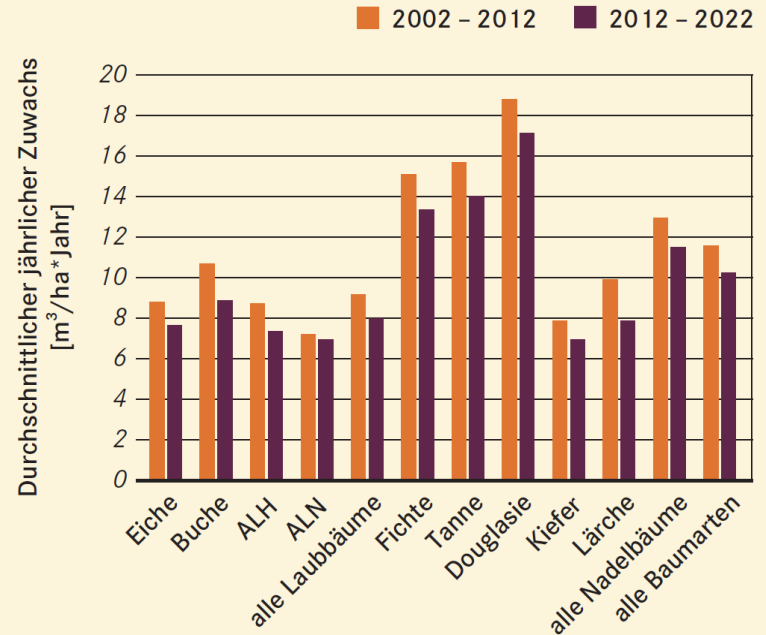
Vorratsveränderungen nach Baumartengruppen seit der BWI 2012



*ALH: andere Laubbäume mit hoher Lebensdauer

*ALN: andere Laubbäume mit niedriger Lebensdauer

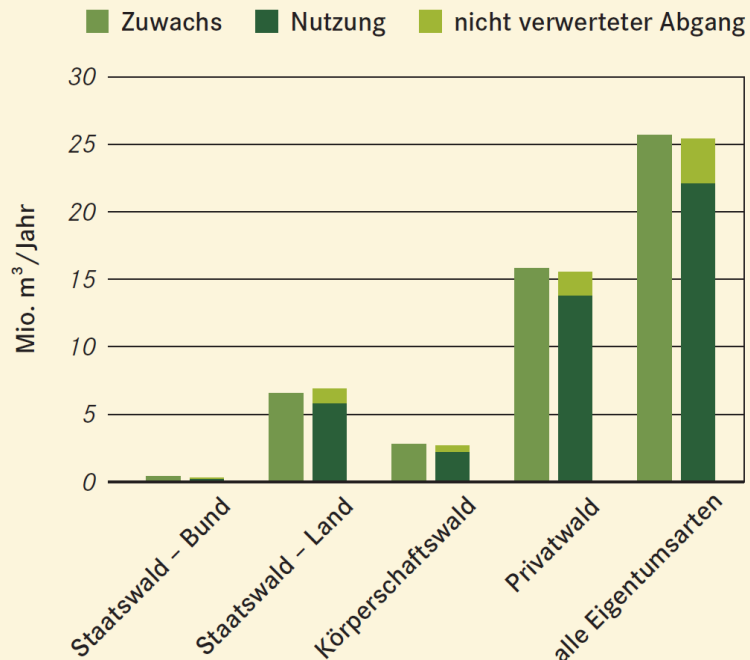
Durchschnittlicher Zuwachs nach Baumartengruppen



Facts and figures.

Growth and use.

Holzzuwachs und Holzabgang

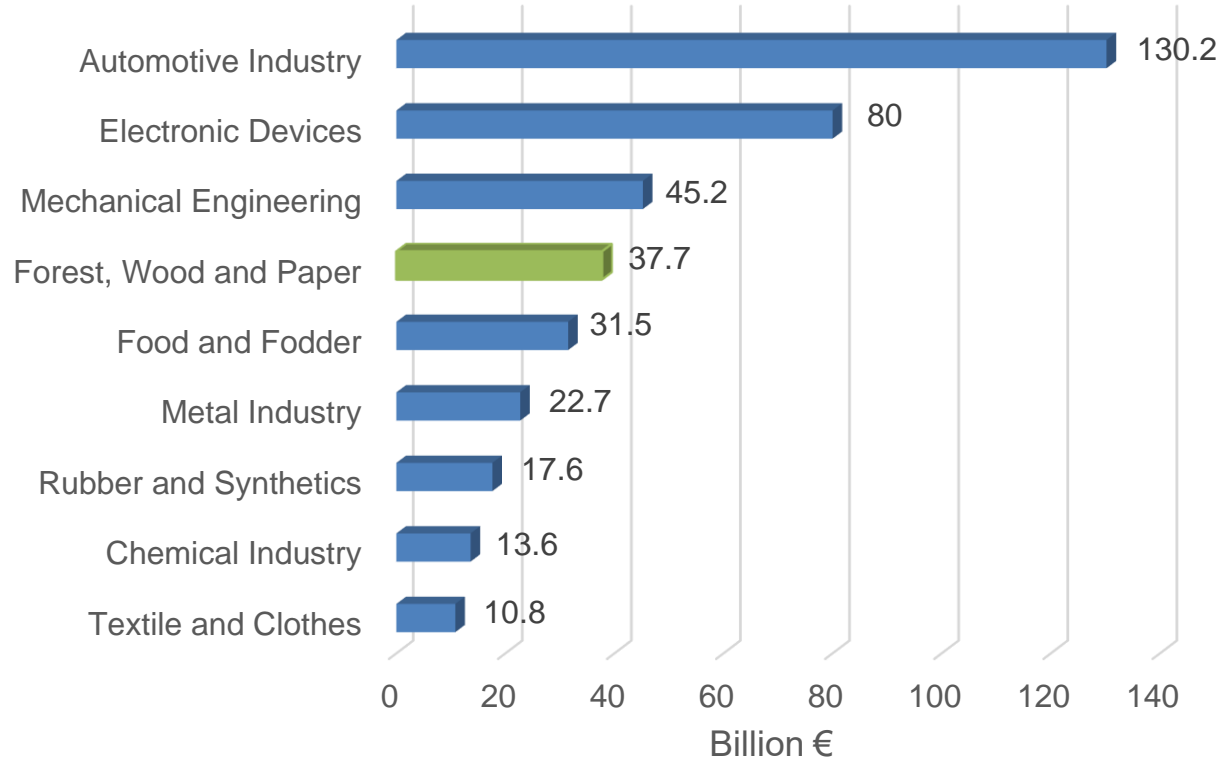


Durchschnittliche jährliche Holznutzung nach Baumartengruppen



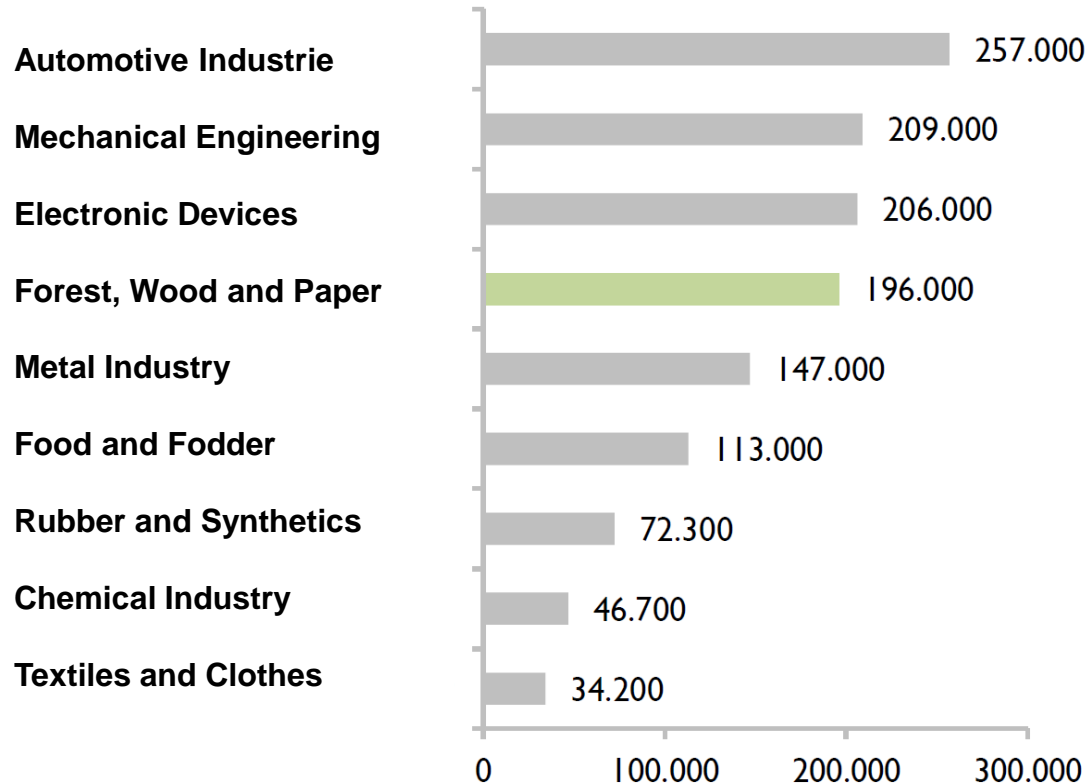
Facts and figures.

Value added by economic sector (2015).



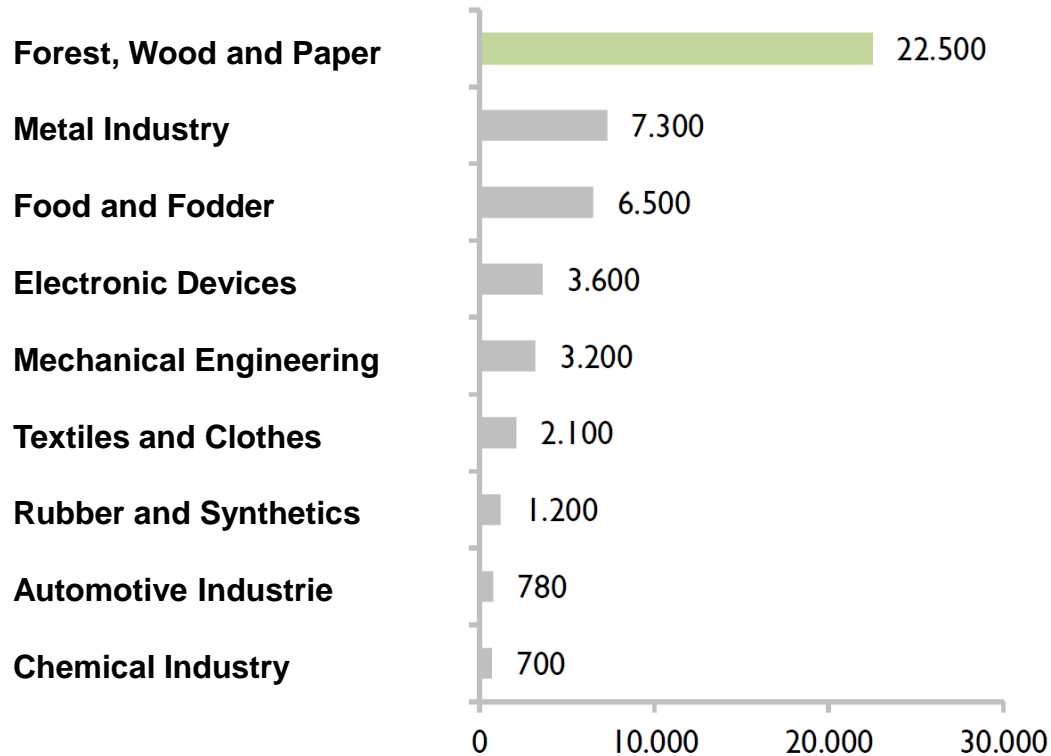
Facts and figures.

Employees by manufacturing sector (2013).



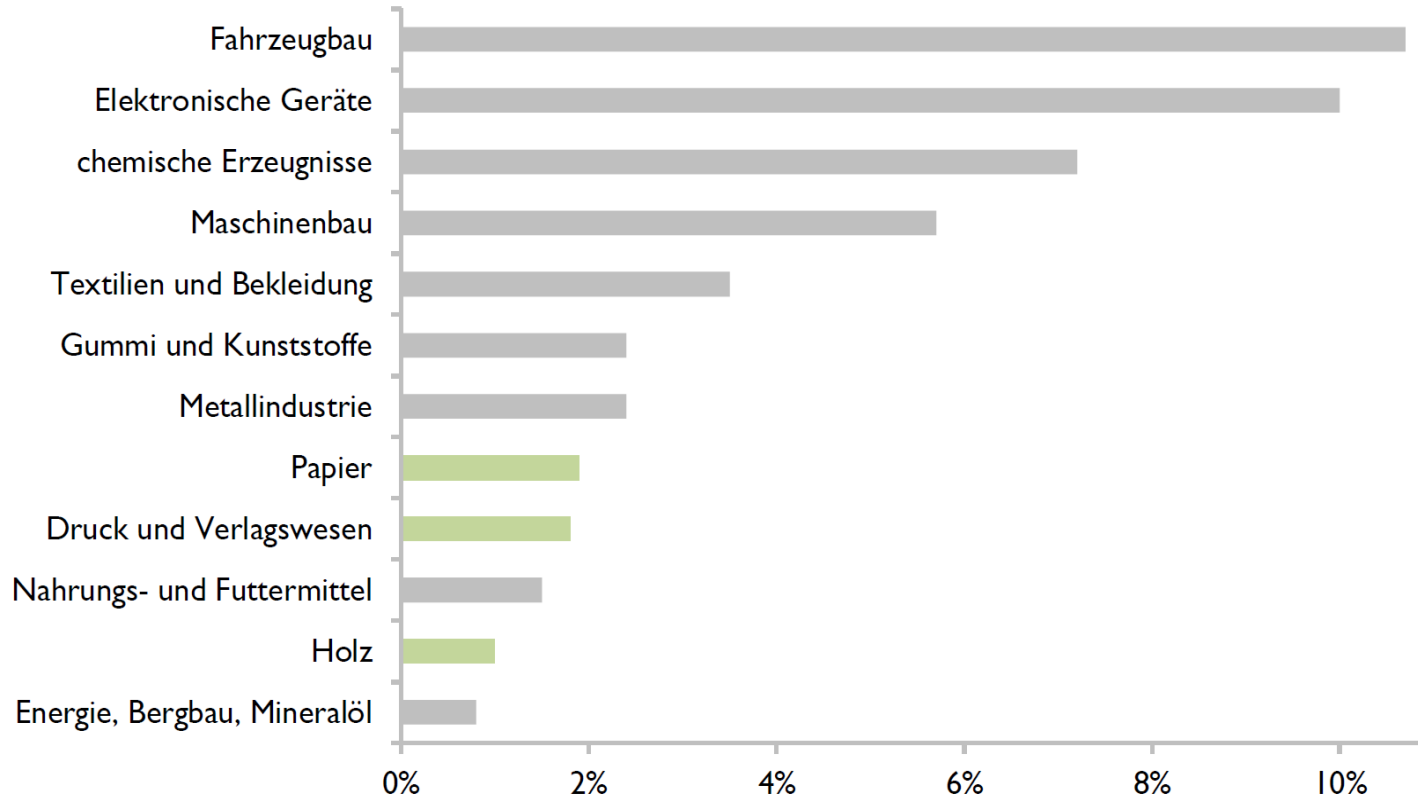
Facts and figures.

Number of companies (2013).



Facts and figures.

Share of innovation expenditure in sales (2013).



Challenges for small and medium-sized enterprises.

What hinders innovation?



- Day-to-day business leaves little / no time for research and development
- No access to state-of-the-art knowledge
- No access to partners
- Lack of awareness of current funding programs
- Application and administration are often very complicated (assistance, e.g. from research institutions, required)
- No funding for the application phase
- No experience with application processes
- Low funding volume / rates
- No funding for infrastructure for projects
- Lack of young talent and skilled workers

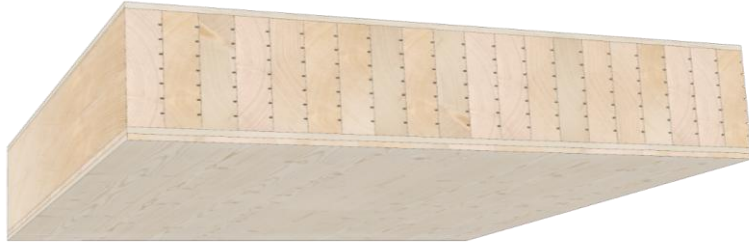
Challenges for small and medium-sized enterprises.

What hinders innovation?



- Disproportion between companies and universities
- High product requirements due to regulation and standardization

Example.
LaNaDeck by company ARS



Example. LaNaDeck by company ARS



Example. LaNaDeck by company ARS



- Funding for the development and establishment of a production line
- Support within the application process