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The Portuguese Forest Harvesting Machinery Fleet

The knowledge on the Portuguese forest harvesting machinery fleet is of fundamental importance for forest companies and machinery suppliers in order to support decision-making about the forest harvesting machinery market and potential new investments for the sector. Timber harvesting in Portugal has an annual production around twelve millions cubic meters, mainly based on Pinus and Eucalyptus plantations. However, there is a lack of general information about the characteristic of the Portuguese forest harvester machinery fleet, used to produce these figures. Most of the forest operations in Portugal are performed by small to medium third-party companies and, with a huge heterogeneity of forest harvesting machine types and ages. This research aims to fulfil the gap on lacking knowledge of forest harvesting fleet in Portugal. Therefore, data was gathered from two main groups: a) Machinery suppliers and; b) Owners of forest machinery and third-party companies. For group “a” it was performed a survey where it was identified the number and age of commercialized forest machinery in the last years. For the group “b” it was gathered information about the company size, machinery type, brand, and machinery age. In total, five questionnaires were applied to the companies of group “a” and over hundred and twenty questionnaires were applied to the companies of group “b”. Preliminary results indicated that there are over one thousand third-party companies working with forest operations and harvesting in Portugal. Most of these companies (74%) are small companies with an annual production up to five thousand cubic meter of timber per year. By the other size, only 7 % of the companies (with an annual production over twenty thousand cubic meters each), are responsible for about 50 % of the total timber production in Portugal. Additionally, circa of 60 % of forest harvester fleet has more than five years old. In conclusion, there is great potential for modernizing the fleet of forestry machines in Portugal. However, there is also a great challenge because this modernization has to contemplate small to medium size companies.

Pedro Britto

Colab ForestWISE

Portugal

José Luis Carvalho

The Navigator Company

Portugal

Susana Morais

The Navigator Company

Portugal

Pedro Silva

Altri Florestal

Portugal

Paulo Machado

Unimadeiras S.A

Portugal

Alexandra Marques

Colab ForestWISE

Portugal