Bioregional Lumberyards

Examples from the Perigord-Limousin region

CREDITS

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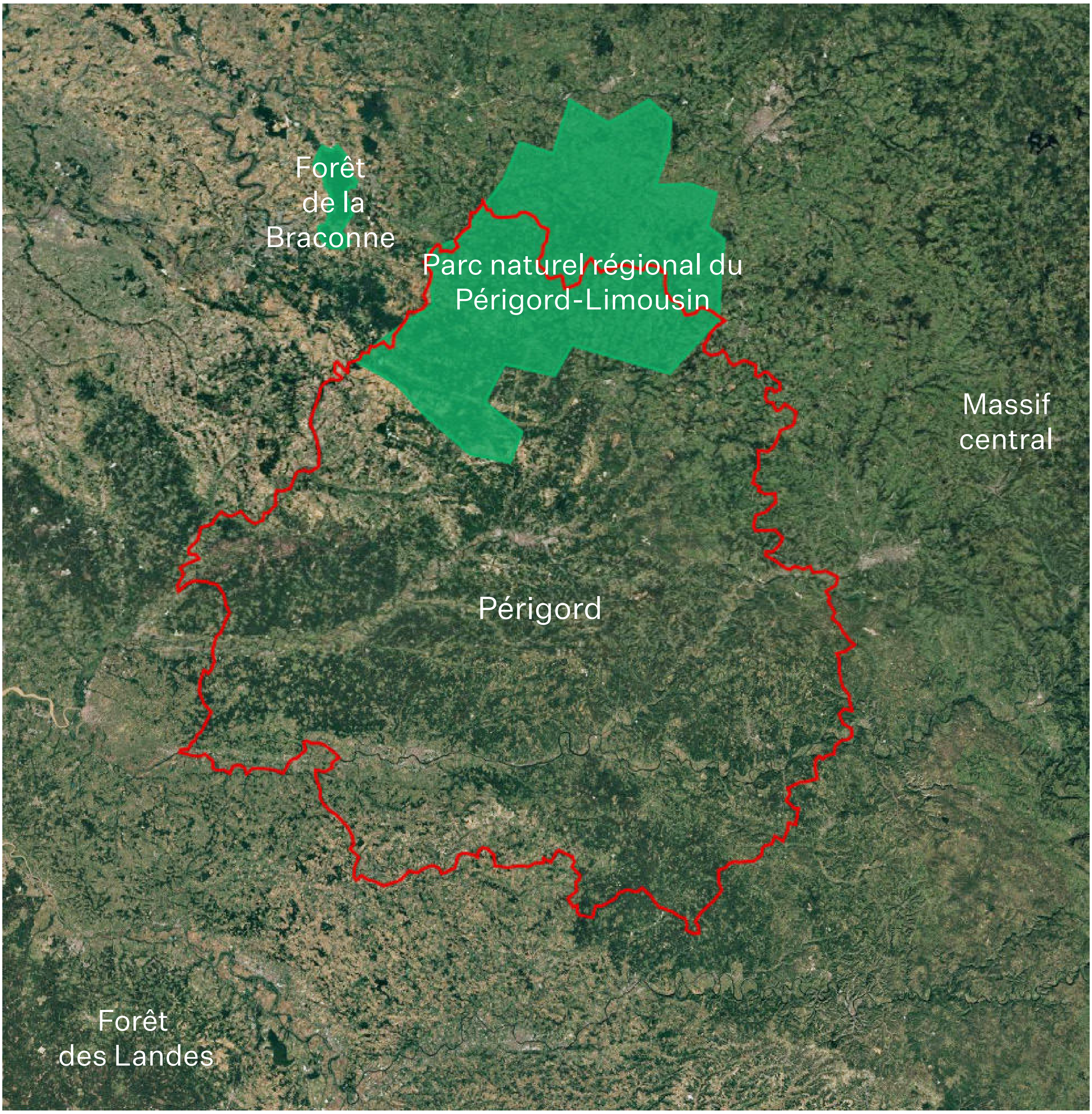
OBJECTIVES, SCOPE, AND KEY AREAS OF ANALYSIS



STUDYING BIOREGIONAL LUMBERYARDS IN THE PÉRIGORD AND LIMOUSIN REGION IN FRANCE

This report aims to explore the **complex relationship between forest ressources - primarily chestnut wood (Castanea Sativa) - and the local timber economy in the South-West of France.** We focus on the Périgord region, a cultural region that covers roughly the same territory as the French Département Dordogne, but also include an area of the Département Limousin region that is part of the Parc naturel régional du Périgord-Limousin (see opposite map). The forest-based economy of the Périgord is also related to other forests, notably the Forêt de la Braconne (Charente), the Massif Central (Cantal), and the Forêt des Landes (Landes).

This region was selected as the primary case study for several reasons: there is a high demand for chestnut wood products in Flanders, coupled with a notable absence of local processing capacity. Additionally, chestnut forests and hedgerows show significant potential in the face of climate change. The comparable legal status between Flemish National Park Brabantse Wouden and French Regional Parks also offers a unique opportunity to examine the organization of a multi-level governance system designed to promote forest conservation while stimulating a sustainable and local chestnut wood production base. Importantly, t**he Périgord region is characterised by a relatively dynamic ecosystem of forest-based activities.**

The scope of this study primarily focuses on **bioregional lumberyards, defined as spaces of primary and secondary conversion of timber sourced from the local ecosystem into lumber or other wood products.** Bioregional lumberyards thus differ from sawmills, lumberyards or wood product manufacturers that source wood at larger scales. The study emphasizes qualitative wood processing rather than purely quantitative production.

Key points of analysis in this report include:

- A **general overview of the companies studied** (Hémard & Vignol, Au Coin des Scieurs, Pigearias, D’un Arbre aux Toits), covering their history, context, the wood species they work with, and their interaction with local forestry.
- An analysis of their **sources and products**, both quantitative and qualitative.
- An evaluation of **equipment and labor**, including machinery, the spatial organization of production lines versus storage, labor specialization (or lack thereof), and staff numbers.
- The **optimization of the revenue model** through diversification and product quality, rather than quantity. It is crucial to understand how these lumberyards’ revenue models have evolved over time through these strategies.
- The concept of **”pulling production,”** which involves processing wood based on anticipated demand or fixed contracts, rather than producing without a clear end goal. This includes examining their client portfolios and preliminary agreements.
- An analysis of **costs and outsourcing** throughout the value chain, from the tree to the final product, and the potential reliance on subcontractors.

The central idea of this study is that the sawmill, or “lumberyard,” is not merely about the quantitative transformation of wood; rather, it constitutes the **core of a more holistic strategy for local wood governance**. Its role is to support, initiate, and coordinate actors to steer change in the urban and territorial wood metabolism, with a focus on producing high-value-added products. This role is also **cultural, serving as a “metabolic hub”** in the bioregoin, placing ecology and people at the heart of the operation instead of mass production. All organisations studied in this report are “metabolic hubs”, but their diversity show that this function can manifest itself very differently: through an annual forest festival, a close integration with chestnut rotatoin cycle, embeddedness with the local demand for timber framing or solid wood flooring.

Ultimately, this work aims to **inform regional governance strategies for local wood utilization in similar contexts**, such as the Brabantse Wouden National Park, and in particular inform the current discussions about the creation of a bioregional lumberyard for making the best use of local wood sourced in Flanders.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Overview

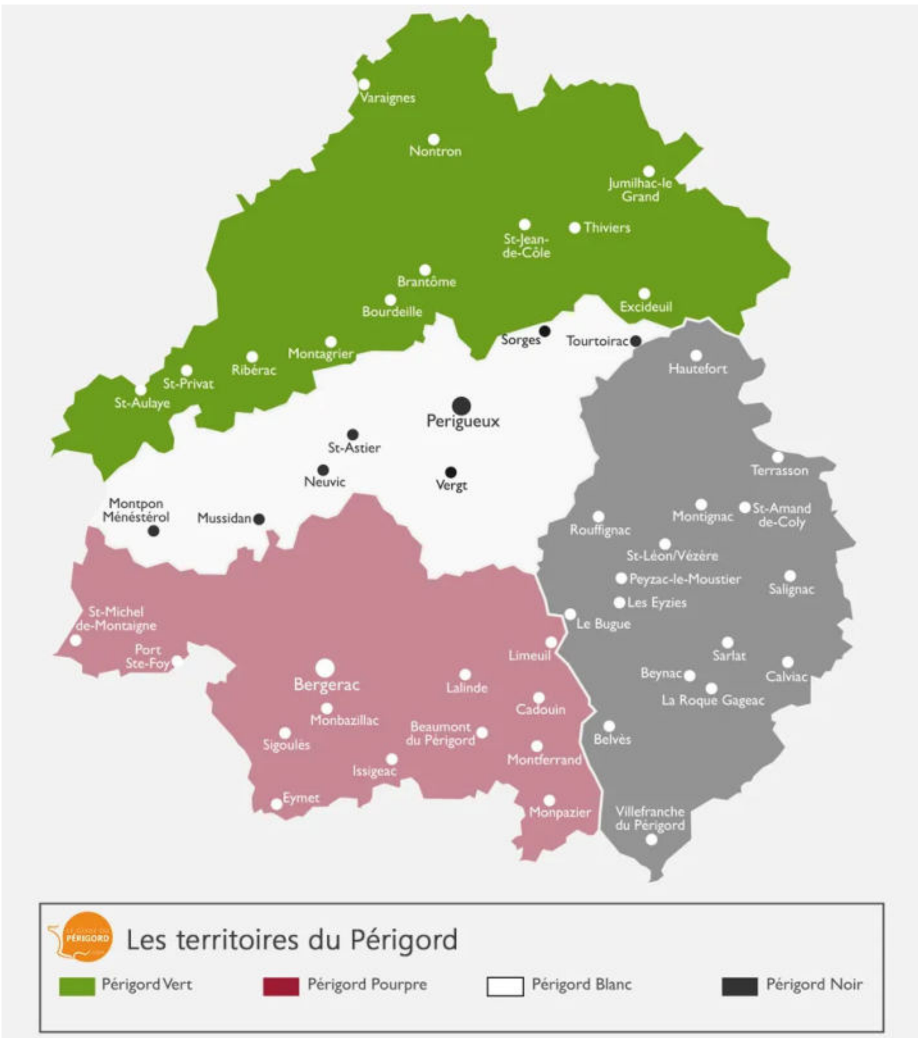
FOREST-BASED ECONOMY OF THE PÉRIGORD LIMOUSIN

The forest-based economy in the Périgord and Limousin regions is currently subject to **two diametrically opposed models**. On the one hand, there is the large-scale harvesting of **forest resources for industrial use**, notably for the paper industry, through clear-cuts of large areas. On the other hand, there is a large **array of small-scale actors with a commitment to locally grounded sustainable practices**, local sourcing, and the diversification of products to generate high value, shifting away from a purely quantitative production model. This economic landscape is supported by a rich network of diverse stakeholders, ranging from private forest owners to various timber enterprises and supportive organizations.

GEOGRAPHICAL OVERVIEW

The region under consideration includes the wider Périgord and Limousin areas, with the Périgord-Limousin Regional Natural Park (PNRPL) being particularly notable for its significant chestnut forests. The Périgord is itself is geographically segmented:

- The Périgord Vert, in the northern part, features granitic soil that effectively retains surface water, fostering the growth of chestnut and oak forests.
- In contrast, the Périgord Noir and Pourpre, located to the south of the Périgord, has limestone soil with less surface water, leading to a more varied forest composition that includes chestnut, oak, and various coniferous species.



Across the broader Limousin region, forests cover an extensive 573,000 hectares, representing a 34% tree cover. A significant ninety-five percent of this forest land is privately owned, characterized by high fragmentation among approximately

166,000 owners, with each holding an average of just 3 hectares. Broadleaf species, including a substantial 15% of chestnut, account for 407,000 hectares, while coniferous species cover 152,000 hectares. Only about 25% of private forests in Limousin are managed under sustainable practices, bringing the total sustainably managed forest in the region to 28%. In Dordogne, the wooded area has remarkably increased by 20% since 1945. Timber businesses primarily source wood locally from Dordogne, but may extend to areas like the Massif Central (Cantal).

OVERALL ECONOMIC DEVELOPMENT AND LANDSCAPE

The region is characterized as a rural area with a low population density (41.5 inhabitants/km²). While it has experienced a period of population stability and positive migration, it faces challenges due to an aging population and a natural deficit. The economy demonstrates a healthy dynamic of company creation and a dense network of small, resilient businesses. These enterprises navigate various contemporary challenges, including sanitary crises, recruitment difficulties, fuel price volatility, and the overarching demands of ecological transition. There is a recognized need for proactive public policies concerning mobility, services, housing, culture, and land management to maintain the region's appeal.

A notable feature of the local economy is the expansion of Social and Solidarity Economy (ESS) initiatives. These diverse initiatives generate non-localizable jobs and drive significant ecological, environmental, social, and organizational transitions.

FOREST MANAGEMENT AND PRACTICES

The predominant silvicultural approach in the region is still marked by clear of areas around 2-5 ha, notably by industrial actors. However, alternative forest networks advocate a mixed, continuous-cover silviculture (SMCC). This "gentle" method is favored for its capacity to enhance forest resilience against climate change, supporting natural ecosystem dynamics, preserving biodiversity, storing carbon, protecting soils and wetlands, and promoting natural regeneration. This contrasts sharply with intensive forest exploitation and clear-cutting, which are considered environmentally detrimental. The high fragmentation of private forest ownership, with an average of only 3 hectares per owner, necessitates strong cooperation among numerous small landowners to facilitate more sustainable management and selective harvesting.

TIMBER ECONOMY: DYNAMICS AND PRODUCT STRATEGIES

The local timber economy strategically focuses on quality and product diversification rather than solely on quantitative production.

- Pricing: Raw timber prices for first-choice chestnut logs exceeding 170 cm in length can command between €33 to €39 per cubic meter on the stump, although prices are subject to quality and dimension fluctuations. Processed chestnut wood products, such as cladding and fencing materials, are competitively priced due to their natural resistance to decay and pests. This inherent durability, stemming from high tannin content, reduces the need for chemical treatments, making them particularly appealing to environmentally conscious consumers.
- Production Model: A key operational principle is "pulling production," where wood is processed based on anticipated demand or established contracts, minimizing costs associated with excessive inventory and risk.

- Product Diversification: Regional companies offer a broad array of products to maximize value from harvested timber and minimize waste. This includes raw lumber, parquet, flooring, cladding, fencing, piquets, and various other finished products. Different portions of logs, even those of heterogeneous or lower quality, are efficiently utilized for a variety of products, thus enhancing overall yield.

MAIN NETWORKS AND COLLABORATIVE GOVERNANCE

The Périgord and Limousin regions actively cultivate a collaborative environment to promote the sustainable use of local timber through various organizations and initiatives:

- **Périgord-Limousin Regional Natural Park (PNRPL):** Beyond its geographical role, the PNRPL organizes the biennial "Châtaignier en projets" Salon, which is vital for promoting the chestnut sector and local economic opportunities.
- **Local Action Groups (GALs):** Active in areas such as Pays du Périgord Noir, Châtaigneraie Limousin, and Périgord Vert, these groups concentrate on critical themes including ecological and energy transition, circular economy, and local supply chains.
- **Cœur de Forêt:** This organization opposes intensive forest exploitation and promotes 100% local sourcing combined with mixed, continuous-cover silviculture. It provides diagnostics for forest plots and connects forest owners with professionals for sustainable management and selective harvesting. The organization has seen a growing number of requests from forest owners in recent years.
- **Réseau pour les Alternatives Forestières (RAF)**: This network champions a "gentle" silviculture, promoting mixed, continuous-cover practices for enhanced forest resilience. Its goal is to foster the development of local, ecological, and equitable forest-wood sectors by facilitating collaboration among citizens, professionals, and territorial actors to transform forest practices and wood-related work. The RAF operates through 13 local "branches" across France, including one in Périgord-Noir, serving as local micro-networks for alternative forestry. It also works through its endowment fund "Forêts en Vie" and the "Bail Forestier Solidaire et Écologique" to acquire and manage forests sustainably.
- **Charte Forestière de Territoire:** In place since 2004, this charter aims to enhance the competitiveness of local forests by improving product quality and quantity, supporting employment, and ensuring sustainable forest multifunctionality.
- **Coop&Bât Périgord-Limousin:** This cooperative for building professionals signifies a shift towards a more collaborative and solidarity-based economic model.
- **"Festival des Scieurs et de la Forêt":** An annual event initiated since 2022, serving as a platform to promote the respectful valorization of local wood, foster synergy in local silvicultural initiatives, and develop short supply chains. It also acts as a crucial tool for client acquisition, visibility, and network building within the bioregion, attracting nearly 1,000 visitors in its second edition.

TYPES OF COMPANIES IN THE FOREST-BASED ECONOMY

The regional timber economy encompasses a variety of company types, from established family-owned businesses to innovative associative models:

- **Sawmills (Scieries):** These are increasingly viewed as “cultural” hubs that prioritize ecology and people over mass production. They typically require around 800 cubic meters of wood annually, which is equivalent to approximately one month’s work for a team of two loggers. They work with a diverse range of local wood species, predominantly chestnut, oak, pine, and Douglas fir, with acacia and poplar also used depending on seasonality and parcel characteristics. Many integrate the entire wood value chain, from forest exploitation and transport to sawing, drying, and second-stage processing. They produce a variety of products, including raw lumber, parquet, and cladding, to maximize yield from different wood qualities. Some sawmills offer custom milling services to both professionals and individuals, with approximately 50% of orders coming from private individuals, 30% from professionals (such as carpenters and joiners), and 20% from other businesses or associations. These operations also frequently revalue wood waste, such as off-cuts, which are sold at reduced prices to local users through “wood groceries,” or provide sawdust and bark for free to dry toilet owners, bakers, or local associations for heating.

- **Wood Product Manufacturers:** This sector includes companies specializing in a range of finished wood products, such as interior and exterior chestnut items, fencing, turned logs, and various construction materials.

- **Timber Framers, Carpenters, and Artisans:** This segment represents a significant demand for local timber. These professionals often seek locally sourced wood for traditional construction and specialized artisanal work. There is an emerging trend towards creating shared workshops and machinery to foster local wood hubs.
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- **Integrated Operations:** Some businesses manage the entire wood value chain, from harvesting and processing to direct distribution to clients, ensuring control over quality and supply.
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- In this report, we will provide **in-depth information on four bioregional lumberyards** that will be presented in the next chapter. **A comprehensive list of companies and organisations is provided in the appendix**.

Overall, the forest-based economy in Périgord and Limousin is moving towards a model that balances economic viability with environmental and social sustainability, emphasizing strong local networks and innovative approaches to forest management and timber utilization.

Case studies

FOUR EXAMPLES OF BIOREGIONAL LUMBERYARDS

OVERVIEW AND SELECTION OF CASE STUDIES

The four companies chosen for this case study—Hémard & Vignol, Au Coin des Scieurs, Pigearias, and D'un Arbre aux Toits—were selected to underscore the diverse strategies and business models at play within the Périgord-Limousin region's bioregional forest economy. They collectively illustrate a spectrum of operations, from long-established industrial players to innovative, community-focused initiatives, each adapting to local wood resources and market dynamics in unique ways.

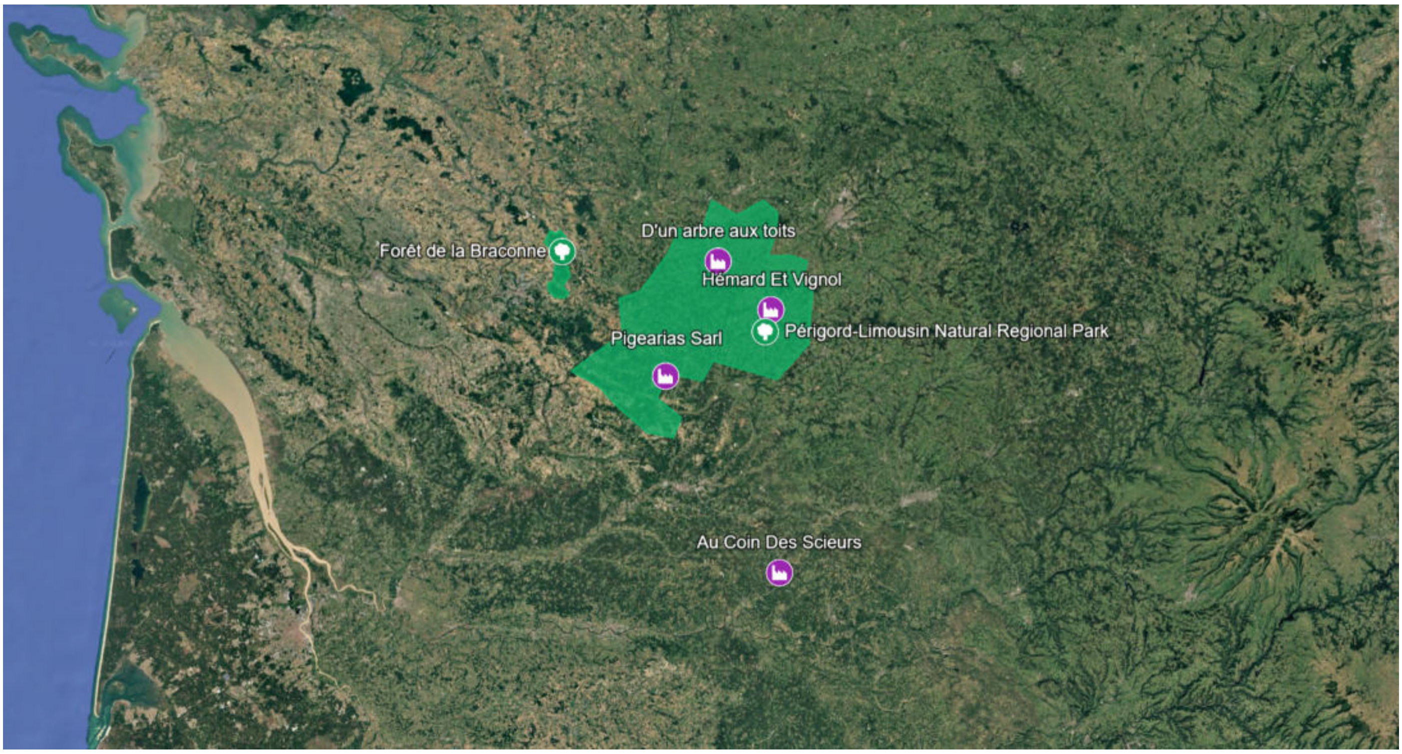
Hémard & Vignol exemplifies a large, traditional commercial enterprise that has specialized exclusively in locally sourced chestnut wood for over a century, operating since 1923. Its significance lies in demonstrating how a long-standing business can achieve a comprehensive "no waste" strategy through extensive product diversification, transforming every part of the chestnut tree into high-value products such as fences, parquets, and interior/exterior fittings. This approach highlights how maximizing material yield contributes to economic viability, even amidst fluctuating net results and high investment needs.

In stark contrast, **Au Coin des Scieurs** represents a much newer, innovative associative sawmill (established 2022) with a strong emphasis on ecology and community engagement over mass production. This model is relevant as it operates on a demand-driven basis, providing custom milling services primarily for local carpenters and private individuals. It functions as a "cultural" hub for a local and solidarity-based wood-forest sector, actively promoting gentle, continuous-cover silviculture. Its reliance on volunteering and community events like the "Festival des Scieurs et de la Forêt" showcases an alternative, socially-driven pathway for local wood valorization, despite its inherently lower financial profitability and smaller scale compared to industrial operations.

Pigearias, a family-owned limited liability company founded in 1986, operates under the brand "PérigordParquet" and serves as an example of an integrated value chain. This company manages the entire process from forest exploitation to direct B2B distribution of its diverse products, which include raw lumber, parquet, and cladding. Its "pulling production" strategy and "yield logic" are key to its relevance, illustrating how businesses can efficiently utilize various wood species and qualities to maximize value and minimize waste, even when operating with consistently low profitability.

Lastly, **D'un Arbre aux Toits**, a sole-shareholder simplified joint-stock

	Hémard & Vignol	Au coin des scieurs	Pigearias	D’un Arbre aux Toits
Location	1 RTE DES TROIS FONTAINES, 87230 BUSSIERE-GALANT	261 CHEM. DE LA GRAVE, 24620 TURSAC	LA CHAPELLE MONTMOREAU, 24300 LA CHAPELLE-MONTMOREAU	52 ROUTE DE LA BARBARIE, 87150 ORADOUR-SUR-VAYRES
Legal form	SAS, société par actions simplifiée	Association déclarée	SARL, société à responsabilité limitée	SASU, société par actions simplifiée unipersonnelle
Size of infrastructure (production and storage of final products)	3.5 ha	0.45 ha	1.73 ha	0.14 ha
Size of infrastructure (lumber storage)	1.35 ha	0.26 ha	1.09 ha	0.32 ha (additional storage at partner sawmill)
Date of creation	current legal form was established 01/01/1965 (company exists since 1923)	1/6/2022	10/1/1986	3/7/2024
Number of employees	39	3	4	0
Main activity	Sawmilling and planing of wood, excluding impregnation	Custom sawmilling services and awareness-raising	Forestry operations, sawmill, manufacturing of moulded parquet, terrace boards and cladding	Timber framing services using locally sourced raw materials, sale of sawn timber, shared workshop

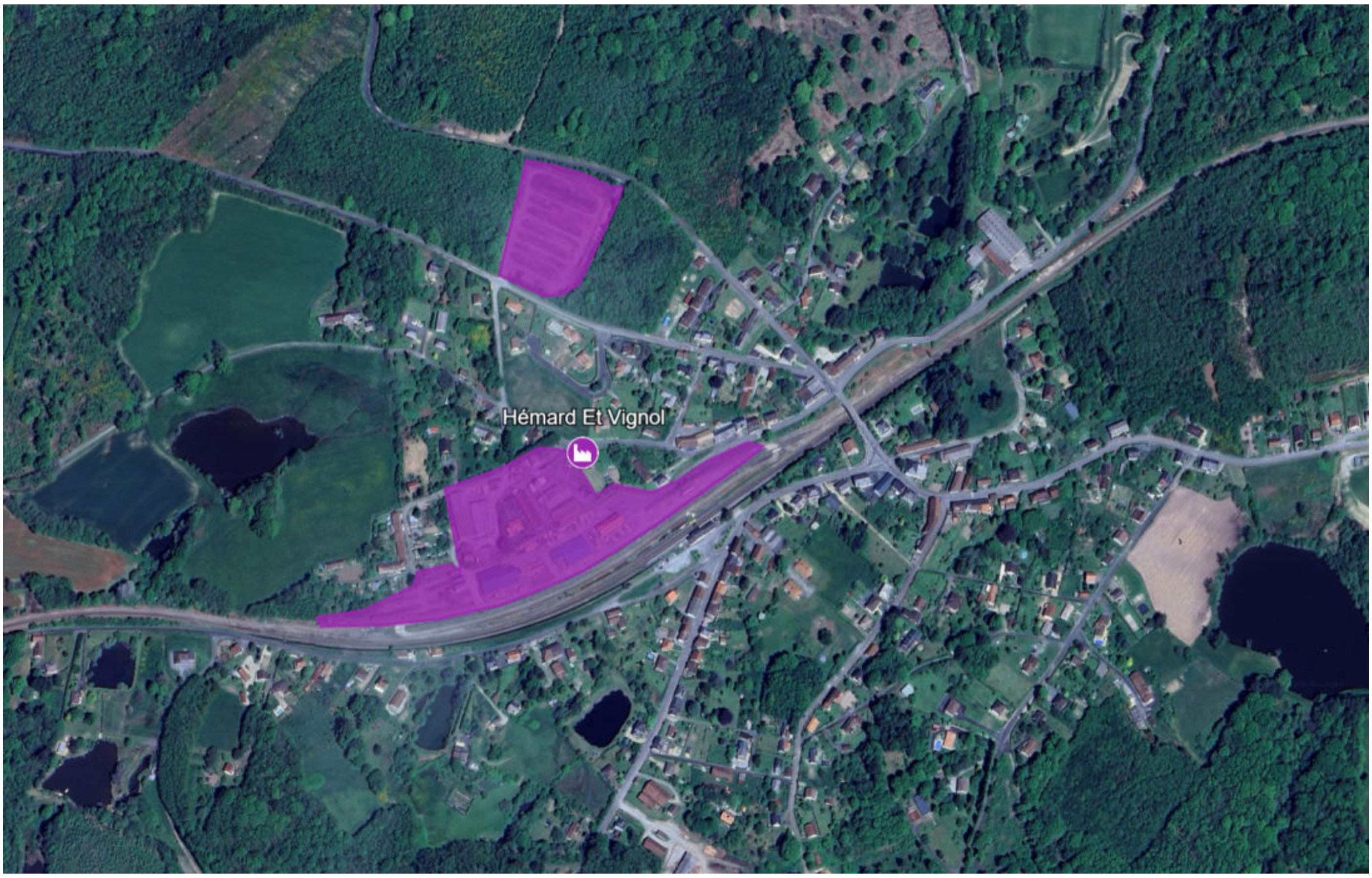


company established in 2024, showcases an artisan-led model focused on carpentry, roofing, and joinery. Its importance lies in its proactive efforts to control local sourcing within a tight 20-kilometer radius and to build a short-circuit network with local sawmills and firewood producers. This company exemplifies the necessity of combining timber framing services with raw wood sales, as this dual income stream is crucial for the economic viability of local sourcing and the full utilization of wood fractions, reflecting both the challenges and opportunities for small-scale, specialized businesses aiming for sustainable operations within the region.

Together, these four companies, spanning different legal structures, operational scales, and core philosophies, provide a comprehensive look at the multifaceted strategies employed in the Périgord-Limousin region to manage, process, and market local timber, each contributing uniquely to the overall diversity of its bioregional forest economy.

Hémard & Vignol

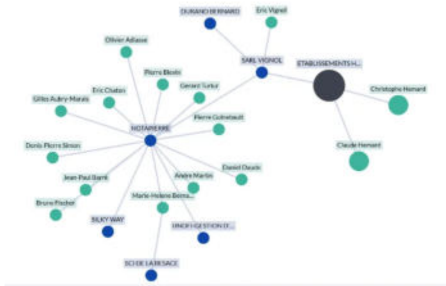
SUCCESSFUL SCALING AND SPECIALIZATION



1. GENERAL DESCRIPTION

Hémard & Vignol is a large, traditional commercial enterprise with a history spanning over a century, having been founded in the 1920s. Its current legal form as a SAS (société par actions simplifiée) was established on January 1, 1965, with its registration in the RCS of Limoges dating back to October 24, 1958. The company is strategically located in Bussière-Galant, within the Périgord-Limousin Regional Natural Park, and is recognized as one of the primary chestnut wood processing companies in its region. The company is managed by Christophe and Claude Hemard and represents the fourth generation of a family business implanted in the heart of the “pays des feuillardiers”.

As of 2022, Hémard & Vignol employs between 20 and 49 people, with a specific figure of 39 employees mentioned. The company operates under core values such as passion for the trade, team spirit, environmental respect, quality, and performance, which are seen as drivers of its evolution and progression, fostering high-quality work and excellent client relationships. Fieldwork conducted in October 2023 further underscored its integral role in the intricate relationship between chestnut forest management and the local timber economy. The company’s share capital is €13,304.52. Its SIREN is 765 500 186 and SIRET is 765 500 186 00018, with VAT number FR59765500186.



Ownership structure of Hérman & Vignol.

2. PRESENTATION OF OPERATIONS AND FOOTPRINT

Hémard & Vignol maintains an exclusive focus on locally sourced chestnut wood (Castanea Sativa). The company procures its raw wood supply from chestnut coppices within an approximate radius of 100 kilometers, primarily from the Périgord-Limousin Regional Natural Park. This region notably lacks local processing capacity for chestnut wood despite a significant demand for chestnut wood products in Flanders. The reliance on coppices, a traditional silvicultural method where trees are felled at a young age (typically 10-20 years), allows new shoots to regenerate from the existing stump, promoting vigorous initial growth and rapid re-closure of the canopy, which is advantageous for forest resilience, especially in the context of climate change. This sourcing strategy is directly linked to the rotation cycles of chestnut coppice management.

Administrative building and final products ready for shipment.

The company’s operations are strategically divided between two main sites: one for log storage and the other for product manufacturing. Upon arrival from the forest, logs are transported to a designated sorting and storage area located adjacent to the factory, where they undergo meticulous sorting based on diameter before processing. The total size of their infrastructure is substantial, with 3.5 hectares for production and storage of final products, and 1.35 hectares for lumber storage. This considerable capital demand necessitates ample operational space for its activities, including raw log storage, processing facilities, and the efficient collection of waste materials. Any waste materials, such as bark, wood chips, and particles, are efficiently collected in a central zone to streamline their management and transportation. Hémard & Vignol has engaged in continuous collaboration with skilled artisans since the early 2000s to master the complexities of working with chestnut wood, which can be challenging due to its hardness and grain patterns. This specialized knowledge provides a competitive advantage. The company regularly integrates technological innovations, including locally produced machines, while consciously retaining valuable artisanal and manual aspects of its operations. Their production lines are highly flexible, capable of processing logs and log sections of varying dimensions, with the choice of material guided by the age of the harvested forest stands, timber quality, and market demand.


Production is upon order, but intermediate products and raw materials have to be kept at relatively high inventories. Chestnut logs, intermediate and final products can be stored outside.

3. DESCRIPTION OF PRODUCTS AND MARKETS

A core aspect of Hémard & Vignol's business model is the optimization of revenue through extensive product diversification and a commitment to quality, rather than merely focusing on quantitative output. This strategy embodies a "no waste" philosophy, ensuring that every fraction of the chestnut tree is utilized to its highest possible value. This approach is particularly critical given the unique properties of chestnut wood, which require precise treatment to minimize material loss.
Their diverse product portfolio includes:

- Large poles: Mechanically debarked and split. Splitting, as opposed to sawing, reduces material loss (eliminating sawdust) and improves the wood's durability by preserving cell wall integrity when exposed to water.
- Smaller fencing systems: Such as the widely recognized "Castanearaster" in Flanders, made by splitting smaller logs and assembling them with metal wire. There is a significant demand for chestnut wood products in Flanders.
- Gates and Prefabricated Fences: Crafted from chestnut planks, with shorter planks often joined using finger-joint connections and main frames assembled with robust mortise and tenon joints.
- Interior finishing materials: A dedicated facility produces parquet and other interior finishes from the thickest chestnut logs.
- Vat rings (feuillards): Hémard & Vignol is one of the few remaining companies in France that produces chestnut wood hoops, which are in constant demand, particularly for the high-end Cognac barrel market. This specialized process involves skilled craftsmen hand-sawing and peeling thin chestnut twigs, then meticulously rolling them into molds.
- The company also produces piquets and terraces.

They benefit from two on-site drying ovens, which significantly simplify production logistics. A significant development in 2015 was the standardization process for chestnut wood, establishing clear usage classes for various applications and contributing to the efficient utilization of chestnut wood's unique properties across different industries.

4. DESCRIPTION OF DISTRIBUTION MODEL

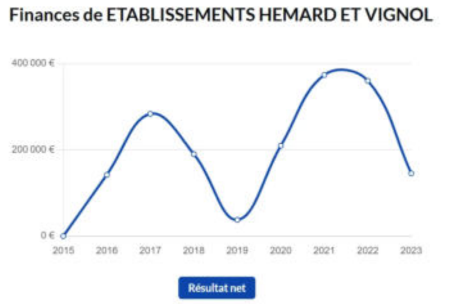
Hémard & Vignol's finished products are sold to a diverse clientele comprising professional and private clients. The company employs a "pulling production" strategy, initiating wood processing based on anticipated demand or confirmed contracts. This approach is crucial for minimizing costs associated with excessive inventory and mitigating market risk. While maintaining a necessary stock of raw logs and intermediate products, which demands substantial outlays for materials and considerable storage space, the final production of specific items typically commences only after an order has been received and paid for.

This direct distribution model allows Hémard & Vignol to bypass intermediaries, potentially leading to improved profit margins. Historically, the company’s location near a railway line provided a strategic advantage for transport; however, road transport is now the sole practically feasible option for deliveries, even for large Belgian customers who prefer rail transport for ecological reasons, due to logistical barriers.

5. ANALYSIS OF FINANCIAL DATa

An analysis of Hémard & Vignol’s financial data reveals that its net result has shown significant fluctuations over recent years.

- In 2023, the net result was €145,000, representing a decline from €360,000 in 2022 and €374,000 in 2021. The net result was €210,000 in 2020.
- The company’s financial history also indicates notable downturns in 2015 and 2019.
- Hémard & Vignol requires relatively high levels of investment. This is evident in its substantial equity, or “fonds propre,” which amounted to €3.65 million in 2023 (€3.62 million in 2022, €3.33 million in 2021, €3.06 million in 2020).
- Furthermore, the company carries a relatively high level of debt.
- Financial debts totaled €795,000 in 2023, a reduction from €1.07 million in 2022 and €1.48 million in 2021 (€1.26 million in 2020).
- The gearing ratio (debt to equity) was -0.3 in both 2022 and 2023 (-0.1 in 2021 and 2020).
- Total current liabilities (“État des dettes à 1 an au plus”) were €1.41 million in 2023 (€1.39 million in 2022, €1.19 million in 2021, €1.08 million in 2020).
- The company’s working capital requirement (“BFR”) was €1.08 million in 2023 (€1.03 million in 2022, €1.13 million in 2021 and 2020), with its operating working capital (“BFR exploitation”) recorded at €1.5 million in 2023 (€1.52 million in 2022, €1.41 million in 2021, €1.4 million in 2020). Its financial autonomy percentage was 67.8% in 2023.



The bottom line results of the company have fluctuated widely over the last 10 years, despite a strong demand for outdoor chestnut products, in particular fencing.

In summary, while Hémard & Vignol maintains a strong market presence, its financial performance is marked by considerable fluctuations in profitability and a consistent need for substantial capital investments.

6. CONCLUSIONS OF THE CASE STUDY

Chestnut flooring products.

Hémard & Vignol is a large, traditional commercial enterprise with a century-long history, strategically positioned as one of the primary chestnut wood processing companies in its region.

Key strategic specializations include:

- An exclusive focus on locally sourced chestnut wood, primarily from coppices within a 100-kilometer radius of the Périgord-Limousin Regional Natural Park.
- A strong commitment to diversification of chestnut products and a “no waste” philosophy, aiming for optimum yield and utilizing every fraction of the tree to its highest value. This involves continuous collaboration with skilled artisans and integration of technological innovations.
- The company’s sourcing strategy is directly linked to the rotation cycles of chestnut coppice management, adapting production to the age of harvested forest stands.
- There is a high demand for fencing products, particularly the

Production facilities are spread over several hangars on more than 3 hectares.

“Castanearaster,” in Flanders.

- The standardization process for chestnut wood in 2015 has further supported the efficient utilization of the material.

Despite its strong market presence and strategic advantages, Hémard & Vignol’s financial performance is characterized by challenges:

- The net result is highly fluctuating, with large downturns noted in 2015 and 2019, and a decline in profitability from 2021 to 2023.
- The company carries a relatively high level of debt.
- Operations require relatively high investments, as evidenced by substantial liquidity needs to restock log inventory and outlays, and necessitate considerable operational space for raw log storage, processing, and waste collection.

Hémard & Vignol’s “pulling production” strategy and direct distribution model aim to minimize inventory costs and improve profit margins. The company, like other case studies, addresses the challenge of utilizing wood with heterogeneous quality by offering diverse products from the same species. While maintaining a strong market presence through its specialized focus and continuous product diversification, its financial performance is marked by considerable fluctuations in profitability and a consistent need for substantial capital investments.

Au coin des scieurs

A COLLABORATIVE MODEL FOR LOCAL WOOD REVITALIZATION

The lumberyards maintains a self-service area for small wood purchases, allowing to sell cut offs or odd-sized boards at low cost.

1. GENERAL DESCRIPTION

Au coin des scieurs is an “association déclarée”, officially founded on January 6, 2022. Its physical location is LA GRAVE, 24620 TURSAC, situated in the southern part of the Dordogne department, specifically the Périgord Noir region where forests are more mixed with chestnut, oak, and resinous species. The association is identified by SIREN 909 425 860, SIRET 909 425 860 00014, and VAT number FR11909425860. In 2025 the association employs three employees. While its primary activity is listed as “Autres organisations fonctionnant par adhésion volontaire” (Other organizations operating by voluntary membership), its core focus is on “Sciage et sensibilisation” (Sawing and sensitization). The association holds an “Economie sociale et solidaire” (Social and Solidarity Economy) label.

2. OBJECTIVES AND MISSION

The overarching objective of Au coin des scieurs is to “govern the activities of the Tursac sawmill and to locally energize the ‘wood’ sector”. This is achieved through a multi-faceted approach aimed at promoting sustainable forestry and a local, solidarity-based wood industry:

- Leading sensitization actions on soft silviculture. The association advocates for a “sylviculture mélangée à couvert continu (SMCC)” (mixed continuous cover silviculture), also known as irregular management, which prioritizes natural forest ecosystem dynamics to ensure long-term forest health, biodiversity, carbon storage, soil preservation, and wood production.
- Restructuring the local wood-forest sector (“filière bois-forêt”). This involves encouraging a short, local, and solidarity-based wood-forest chain.
- Opening access to the sawmill for locals, professionals, and individuals for activities, training, and sawing services.
- Creating a collaborative workspace for exchanges and sharing information on wood and forest topics, along with related activities.
- Contributing to the maintenance of living and diversified Périgord forests by promoting a 100% local supply model based on SMCC, coordinating a network of alternative wood-forest professionals, advising forest owners on sustainable management, and raising public awareness.
- Maintaining and consolidating local know-how by relaunching an artisanal family sawmill, fostering skill exchange, organizing local training, offering custom sawing services, and encouraging the use of local raw wood by loggers and debarters.
- Reinforcing local social cohesion through solidarity and mutual aid, including offering salvaged saw offcuts at solidarity prices and making by-products available to locals and associations via the “Épicerie Bois”.

3. OPERATIONS AND TIMELINE

The current operation builds upon the history of the Agrafeuille sawmill, which closed in 2017. The restart of the sawmill and the formation of the association occurred in 2021 through a meeting between the Agrafeuil family and entrepreneurs from Coop&Bât Périgord-Limousin, who were concerned about the future of their profession due to dependence on healthy local forest resources. The timeline of operations has been:

- 2021 (Autumn): Meeting of Coop&Bât Entrepreneurs with the Agrafeuil family (previous owner of family sawmill).
- January 2022: Creation of the Au Coin des Scieurs association.

- 2022: Restoration, learning, and project structuring. The official inauguration of the associative sawmill in September 2022 coincided with the first edition of the Festival des Scieurs et de la Forêt, which stimulated local forestry initiatives and launched the short-chain project.
- Winter 2022: First delivery of wood.
- 2023: Testing of activities, team training, and fine-tuning. This year saw the development of partnerships and the creation of jobs. The second edition of the Festival and the inauguration of the "Épicerie Bois" also took place.
- Autumn 2023: First wood delivery via Cœur de Forêt.
- 2024: First year of procurement and local stock management, targeting 250-350 M³. This year also involved support from the Nouvelle-Aquitaine region and local communities, and the purchase of electric sawmill equipment, a Manitou telehandler, and an edger.
- 2025: Plans include forming a team of 6 lumberjacks for selective harvesting.

Logs (oak and douglas) are stored until they are used for a custom-milling project. The turnover is around 12 months.

The association's operations require a very high level of energy from the team, which poses a risk of burnout.

4. ORGANIZATIONAL STRUCTURE AND GOVERNANCE

Au coin des scieurs operates with a "gouvernance partagée" (shared governance) model, where every member can participate in fundamental discussions, activity organization, and collective decisions. This governance has adopted the form of a holacracy: "an organizational governance system that allows an organization to disseminate decision-making mechanisms through a fractal organization of self-organized teams".

The collective dynamic is distributed among 5 relatively autonomous and interdependent "Coins" (work groups):

- Coin Activité Scierie: Organizes and plans sawing activities, stock management, and workshop/machine maintenance.
- Coin Filière Locale: In collaboration with Cœur de Forêt and the local branch of the RAF (Réseau pour les Alternatives Forestières), ensures and coordinates networking among various sector actors.
- Coin Administration/Finances: Manages the financial, administrative, and legal aspects of the association.
- Coin Com': Ensures fluid internal, external, and event-related communication.
- Coin Coordination: Coordinates, facilitates, and guarantees the association's "raison d'être" (reason for being). Each "Coin" has a referent within the Coordination to facilitate information exchange.

Custom milling for private landowners who come with their own logs is billed as a service by the hour.

The sawmill team includes key roles:

- Coordinator: Handles requests, proposes quotes, invoices completed jobs, and manages client follow-up.
- Production Manager: Manages supply, prepares sawing lists, selects logs from the yard, and transports them with the telescopic handler.
- Mechanic: Ensures machine maintenance.
- Sawyer: Operates the log saw for primary cutting into posts or slabs, and resharpens blades.
- Edger: Operates the edger for secondary cutting into various width sections.
- Assistant Edging: Receives wood after secondary cutting, sorts it, and finalizes orders.
- Wood Grocer: Sorts and revalues offcuts from primary and secondary

The association has taken over an existing family sawmill and installed a new electrical mill.

cutting by edging, planing, or sawing as needed, then restocks and sells wood from the grocery.

The association offers 3 types of memberships:

- Sympathizer memberships: Free price (consultative voice at the General Assembly) to support the association.
- Active member memberships: €5 to contribute more actively to the association's life and receive regular updates.
- Pro memberships: €210 to benefit from specific sawing tariffs and access to machines and the workshop (subject to sawyers' validation). Members are invited to monthly collective days and organizational meetings for events and projects.

5. PRODUCTS AND MARKETS

Au coin des scieurs operates with a mixed income model, derived from:

- Custom milling services ("sciage à façon") for small landowners. Clients provide their cutting lists via email, phone, or contact forms. The production manager then prepares a quote for validation before scheduling the job. Once the order is prepared, the client is notified, and the service is invoiced. These services are offered for timber up to 6.30m, from soft management, untreated, on demand, and in various species.
- Selling of sawn timber and custom milling for carpenters. These services are primarily aimed at professionals (carpenters and joiners, 30%) and companies/associations (20%) like Coop&Bat and Communauté Dhagpo.
- "L'Épicerie Bois" (the Wood Grocery): A self-service local wood service offering retail sales at reduced prices. This wood consists of offcuts and non-conforming pieces generated during sawing, which are revalued and sorted by the wood grocers for local users. Prices vary based on wood species, quality, section, and length. It operates with advice from wood grocers on Fridays (9 am-5 pm) and is self-service throughout the week for regulars. This initiative promotes solidarity and mutual aid by providing access to revalued saw offcuts and making by-products (sawdust, bark, slabs, crusts) available for free to dry toilet owners, bakers for their ovens, and other locals, with some reserved for associations to redistribute as firewood.

The association has 3 employees and several volunteer who help with operations and other tasks.

A key characteristic of its business model is its demand-driven emergence. The lumberyard does not have to actively seek clients, as milling is done for carpenters on demand. This reduces inventory risk. Losses from custom milling services are passed down to clients, as they are invoiced by the hour rather than based on yield or quantities. The quantities of wood processed are relatively small. The association aims to create a proximity commercial service and contribute to establishing a common local wood culture and a short wood circuit.

6. SUPPLY CHAIN AND FOREST LINK

For a year of sawing operations, the sawmill requires approximately 800 m^3 of wood, which is equivalent to "one month of work for a duo of loggers". The association emphasizes sourcing local wood, as diverse as the Périgord forest massifs: predominantly chestnut, oak, pine, and Douglas fir, with acacia and poplar depending on seasonality and parcels selected for selective harvesting.
In 2023, its first year of operation, sourcing challenges were significant, with many missing links in the supply chain and few local operators capable of

selective harvesting. The 360 m³ supply in 2023 comprised:
- 60% from local conventional sources (historical supplier of the Agrafeuil family sawmill).
- 25% from selective harvesting in Aveyron (via Avenir Forêt).
- 15% from local selective harvesting (internal logging).

For 2024, the objective of 100% local supply from sustainable management and selective harvesting was achieved. This wood is sourced from forest massifs in Dordogne, Lot, and northern Aveyron (maximum 150 km distance). The partnership with Cœur de Forêt is a significant leverage point in structuring the “soft” sector and experimenting with selective harvesting sites. Cœur de Forêt technicians provide free diagnostics to forest owners, connect them with sylvicultural professionals (loggers, debarters, operators, transporters), and supervise harvesting to ensure compliance with Cœur de Forêt specifications. However, creating and organizing local teams of loggers and debarters for selective harvesting remains a challenge.

An example of terrain management is the Douglas fir from Aveyron, where 45 m³ were purchased via Cœur de Forêt from a “groupement foncier agricole”. The objective was sustainable forest management, preserving the forest cover as much as possible. This included assessing diverse forest types (Douglas fir stands, mixed plantations, oak-dominated broadleaf areas, chestnut coppices, red oak plantations) and planning necessary work like thinning, sanitary cuts, and replanting to maintain diversity and produce quality timber. The process involved Cœur de Forêt technicians connecting the GFA with a forest operator for felling and debarking, followed by transport to the Tursac sawmill.
The association promotes “gestion irrégulière” (irregular management) or “sylviculture mélangée à couvert continu (SMCC)”. This approach relies on natural forest ecosystem dynamics to maintain a forest capable of delivering diverse services (wood production, biodiversity conservation, carbon storage, soil preservation, education). It aims for quality timber production and continuous natural regeneration.

7. TRAINING AND TRANSMISSION

Au coin des scieurs actively engages in knowledge sharing and skill development:

- Collective Monthly Days: Once a month, volunteers gather to improve the associative sawmill space, engaging in DIY, decoration, cleaning, and shared meals. These events are opportunities to learn how to use portable tools and small machines under the guidance of professionals.
- DIY Workshops with “Épicerie Bois”: The “Épiciers Bois,” who are also wood construction professionals, offer Do-It-Yourself workshops for the general public. These sessions provide guided crafting of items like garden chairs, vegetable crates, and decorative objects using recycled and revalued wood from sawing activities.
- Future Training Perspectives: The association is planning training modules in partnership with professionals and trainers to enhance skills in sylvicultural trades (logging, debarking with horses/mechanized, large diameter logging, valuing curved/small diameter wood, collaborative forest work, post-harvest monitoring, agroforestry, regenerative hydrology) and wood construction. They also plan to offer accompaniment for self-builders (dimensioning, assembly details, wood species selection, thermal/structural/economic aspects, supplier networking). The goal is to address the shortage of local, trained loggers and debarters and, eventually, to become a “Tiers-lieu du bois” (wood

third-place) for encounters, advice, and skill exchange.

8. SENSITIZATION AND OUTREACH

A key element of Au coin des scieurs' strategy is public sensitization and communication, primarily through its annual "Festival des Scieurs et de la Forêt" (Sawyers and Forest Festival):

- The first edition took place in September 2022, marking the sawmill's inauguration.
- The second edition, held on September 22-23, 2023, strengthened this dynamic, attracted nearly 1,000 visitors, and included workshops for schoolchildren. It involved about fifty exhibitors and speakers from various fields related to wood and forest, demonstrating a strong mobilization of the sector.
- The festival's objectives are to highlight the diversity of forest uses (social, ecological, pedagogical, economic, nourishing), give voice to wood-forest sector actors and environmental protectors, foster connections among local forest initiatives, and showcase traditional wood-forest know-how.
- The festival is a key ingredient for client acquisition, visibility, communication, adherence to the project, and networking of the sawmill in the bioregion. It led to the creation of the local RAF branch, the GFCE Les Boiseaux, increased forest diagnostic requests to Cœur de Forêt, and new partnerships.
- The 3rd edition of the festival was held on September 13-14, 2024, again attracting more than 1000 visitors and organisations spanning the entire forest-related community of the bioregion.

Beyond the festival, the association actively participates in partner events (e.g., roundtables for anniversaries, forums, fairs) to promote a wood industry respectful of biodiversity, traditional know-how, and forest ecosystems. They also engage with the media, participating in reports and documentaries (e.g., France 3 Nouvelle-Aquitaine, France 3 POPEX, Arte), radio interviews, videos, podcasts, and press articles to broadly disseminate their values regionally and nationally.

9. PARTNERSHIPS

Au coin des scieurs has forged strong partnerships crucial to its operation and mission:

Professional Wood-Forest Partners:

- Cœur de Forêt: A forest management association, partners since 2022. They have supported the harvest and valorization of 260 m³ of wood, seen an increase in diagnostic requests in Dordogne, and placed a technician in Tursac. They mutually support the construction of a local, short, and sustainable artisan wood sector and experiment with alternative forestry sites.
- Groupement Forestier Citoyen Écologique (GFCE): Ecological forest groups like "Coeur de Forêt" and "Avenir Forêt". The GFCE Les Boiseaux (based in Les Eyzies) emerged from the first Festival. Au coin des scieurs is one of its first associates, with members participating in each other's associative life and commissions.
- Réseau pour les Alternatives Forestières (RAF): A network for forest alternatives, involved in structuring the local wood chain. The local RAF

branch in Périgord Noir was established after the first festival.
- Coop & Bat: A cooperative of building professionals (Cooperative d'Activité et d'Emploi de l'Économie Sociale et Solidaire). They were at the origin of the project, providing €9,500 in financial support to launch the sawmill and enabling shared use of offices and the workshop. They mutually support the sustainability and upskilling of wood trades within an ethical framework.
- Agrafeuil Terrassement et Travaux publics: The family company of Jérôme Agrafeuil (co-president of the association), located on the same site. They assist with isolated forest work, wood transport, and provide handling equipment.
- Copeaux Cabana: A collective of traditional carpenters who use curved woods, traditional joinery, and local wood. They value curved wood via the sawmill and participate in festival animations.

Sensitization and Values Partners:

- La recyclerie Le Pied Allez Triez: A recycling center in Montignac. It serves as a drop-off point for the "Épicerie bois" and supplies revalued wood for their workshops, as well as sawdust for dry toilet kits.
- Collectif Transition Périgord Noir: Its forest group is a partner.

Financial Partners: Financial support from regional and local communities is mentioned.

Festival Partners: Essential for the annual event.

10. INVESTMENTS

The association has identified significant investment needs for 2024-2025 and 2025-2026 to support its professional activity, forest work, and training initiatives. These include:

For professional activity (2024-2025 - Total: €338,800):
- New electric log saw (€90,000)
- Refurbished edger (€15,000)
- Telescopic handler for handling (€35,000)
- Rolling stock (€65,000)
- Stock of soft-managed wood for 2 harvest periods (autumn-winter) (€70,000)
- Building extension and development (€40,000)
- Software and production management tools (€14,000)
- Storage racks for the wood grocery (€2,300)
- Portable tools for finishing and DIY workshops (€7,500)

Investments included a telescopic handler (pictured in green).

For forest work (2025-2026 - Total: €113,000):
- Support for forest teams (€15,000)
- Field consultation time (€3,000)
- Truck for small local volumes (€70,000)
- Engineering and implementation for regeneration (€25,000)
-

For training and transmission (2024-2026 - Total: €25,500 for sylviculture & wood construction, plus €15,150 for sensitization):
- Setup costs for modules with trainers (€4,500)
- Logging equipment (€2,500)
- Calculation and structure software (€6,500)
- Handling and safety equipment (€6,000)

- Consulting and support for wood construction (€6,000)

Festival costs (e.g., logistics, security, communication, artists, catering, staff valorization).

11. CONCLUSION

Au coin des scieurs is a compelling example of a demand-driven emergence of a collaborative sawmill model. It effectively addresses a gap in the supply of local timber for carpenters and other local users seeking sustainably sourced wood.

Key Characteristics and Strengths:

- Demand-driven model: Sawing is done on demand for carpenters, reducing the need for aggressive client acquisition and minimizing inventory costs.
- Diversified income streams: Combines custom milling services for small landowners with sawn timber sales for professionals, complemented by the "Épicerie Bois" for offcut valorization and solidarity. This strategy for heterogeneous wood quality involves passing losses to custom milling clients by invoicing by the hour.
- Strong community engagement: Generates considerable "buzz" through volunteering, media attention, and its annual festival, which is a crucial tool for client acquisition, visibility, communication, project adherence, and networking.
- Commitment to sustainable forestry: Actively promotes and implements "soft silviculture" and selective harvesting, contributing to forest resilience and biodiversity.
- Collaborative governance: Employs a holacracy model and "5 Coins" to distribute decision-making and foster participation.
- Extensive partnerships: Strong collaborations with Coop & Bat, Cœur de Forêt, RAF, and other local entities are fundamental to its operation and short-circuit supply chain.

The "épicerie", or wood grocery.

Challenges and Limitations:

- High emotional and physical involvement: The operation demands a very high level of energy from the team, leading to a risk of burnout.
- Low profitability and scaling difficulty: The financial profitability is likely to remain precarious in the medium to long term, and it is difficult to scale.
- Significant initial investment: Requires substantial investment in equipment and modernization.
- Supply chain development: While 100% local selective sourcing was achieved in 2024, the continuous challenge lies in structuring and organizing local teams for selective harvesting, as well as coordinating with numerous small landowners.

Au coin des scieurs exemplifies a non-profit economic strategy that relies on subsidies, festivals, and volunteering activities within a demand-driven environment where products do not need to be stocked, presenting a unique and community-oriented approach to local wood valorization.

Pigearias

PRODUCT DIVERSIFICATION IN INTEGRATED FAMILY-OWNED SAWMILL

ETABLISSEMENTS PIGEARIAS, known by its brand name "Périgord Parquet," is a family-owned sawmill located in La Chapelle Montmoreau, within France's Périgord Vert region.

GENERAL OVERVIEW AND HISTORY

The company was formally established as a SARL (Société à responsabilité limitée) on October 1, 1986. The sawmill's origins trace back to Adrien Pigearias, the father of the current manager, Jean-Sylvain Pigearias. Jean-Sylvain Pigearias is deeply involved in the business, personally participating in the sawing process and serving as a member of the O.C.B.F. (Organisation Commerciale des Bois Français). The company operates with a share capital of €107,000.

FOREST CONTEXT AND SOURCING

Pigearias is ideally positioned in the Périgord Vert, an area characterized by granitic soil that supports dense chestnut and oak forests. The region's forests are managed sustainably, and notably, the wooded area in Dordogne has increased by 20% since 1945.
The company primarily sources wood locally from Dordogne, but their procurement network can extend to other areas like the Massif Central (Cantal). Pigearias employs its own salaried loggers and utilizes its own skidding equipment to ensure environmentally respectful practices in the forests. While logging operations are largely internal, felling (bûcheronnage) services are often subcontracted.

PRODUCTS AND DIVERSIFICATION STRATEGY

Pigearias boasts a highly integrated operational model, managing the entire wood value chain from forest exploitation and transport to sawing, drying, second-stage processing, and direct distribution. A defining aspect of their strategy is product diversification, which is vital for maximizing the value and yield from harvested timber. Their offerings include:

- High- quality raw lumber.
- Finished products such as parquet flooring, cladding (bardage), floorboards, skirting boards, wood paneling, and terrace planks.

They work with a variety of wood species including chestnut, oak, red oak, larch, acacia, pine, and poplar.

This approach is driven by a “yield logic,” aiming to utilize all parts of the logs, even those of mixed or heterogeneous quality. This involves meticulous sorting and sawing according to the desired final products. For instance, they prioritize cutting large sections and high-quality planks first, then produce variable-length parquet to eliminate defects like knots and cracks, ensuring maximum overall yield. They sell Oak parquet (21mm thickness, various widths) at €70 TTC/m² and Chestnut bardage à claire-voie (22mm x 60mm sections) at €43 TTC/m² for a 1cm space between slats.

A core operational principle is “pulling production,” meaning wood is processed only upon customer order. This minimizes costs and risks associated with holding large inventories of finished goods, though it necessitates substantial stock of raw logs and intermediate products, requiring significant storage space and capital.

The sawmill first produced high-quality timber and uses the resulting off-cuts for the production of flooring at variable lengths, widths and grades. Customer buy a mix.

CLIENTELE AND DISTRIBUTION

Périgord Parquet engages in direct sales to both private individuals and professionals (B2B) across France. This direct distribution model is crucial for maintaining sufficient profit margins by eliminating middlemen. The sawmill supplies local artisans for high-profile restoration projects, including the Grand Théâtre of Bordeaux, Auch Cathedral’s bell tower, and parts of Château de Richemont and Château de la Barde

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INFRASTRUCTURE, EQUIPMENT, AND LABOR

The company’s facilities span 1.73 hectares for production and final product storage, with an additional 1.09 hectares specifically for lumber storage. This extensive storage capacity is essential for managing their raw material and intermediate product inventory. As of 2022, Pigearias employs between 3 and 5 people. They own their rolling stock, including equipment for skidding and log trucks, in addition to their sawing machinery.

FINANCIAL PERFORMANCE (BASED ON 2021 DATA)

Pigearias typically exhibits low profitability, with annual profits around €10,000.

- Net Turnover (Chiffre d’affaires): In 2021, the turnover was €624,190, which was a 9.6% decrease from €690,000 in 2020.
- Net Result (Résultat net): For 2021, the net result was €3,500, a decrease from €8,939 in 2020.

Key Profitability Ratios (2021):

- Gross margin rate: 71.2%.
- EBITDA margin rate: 3.6%.
- Operating margin rate: 0.9%.

Key Annual Costs:

- Raw material purchases: Between €160,000 and €200,000.
- Salary costs: €125,000.
- Other external charges: €200,000.
- Financial Position (as of Sept 30, 2021):

Total Assets: €791,529.
Total Equity: €475,300.
◦Total Liabilities: €316,229.
Working Capital (BFR): €414,000.

Despite their direct distribution model and product diversification, the financial results point to a precarious situation with high risk.

STRATEGIC INSIGHTS AND CHALLENGES

Pigearias is considered a typical example of a small-scale, family-owned sawmill. Its core strength lies in its **strategic specialization and its ability to offer a diverse range of products from the same wood species**, thereby

maximizing value from every part of the tree.

The integrated approach, from logging to direct distribution, allows the company to maintain s**trict control over quality and its supply chains**. However, the company faces significant challenges due to its l**ow profitability and inherent high risk**, which raises questions about its long-term sustainability and the feasibility of succession within the family or to an external buyer.

D’un arbre aux toits

ARTISANAL MODEL FOR LOCAL TIMBER FRAMING AND DIVERSIFIED WOOD VALORIZATION

1. GENERAL OVERVIEW AND HISTORY

D'un Arbre aux Toits is an artisan-led company situated in the Périg-ord-Limousin region, specifically at 52 ROUTE DE LA BARBARIE, 87150 ORADOUR-SUR-VAYRES. While the formal legal entity, a SASU (Société par actions simplifiée unipersonnelle), was established on March 7, 2024, its operational workshop launched in 2023, indicating its activities began prior to official registration. The company is led by director Fischer Thomas and, as of 2025, operates with 0 employees, reflecting its small-scale, artisan-led nature.

2. OPERATIONAL SCOPE AND INFRASTRUCTURE

The company's primary activities are those of a carpenter and timber trader, operating within a shared workshop model. Its declared services are broad, encompassing carpentry, roofing, joinery, and all related second-stage work associated with general building construction. The company's infrastructure includes 0.14 hectares for production and final product storage, with an additional 0.32 hectares designated for lumber storag.

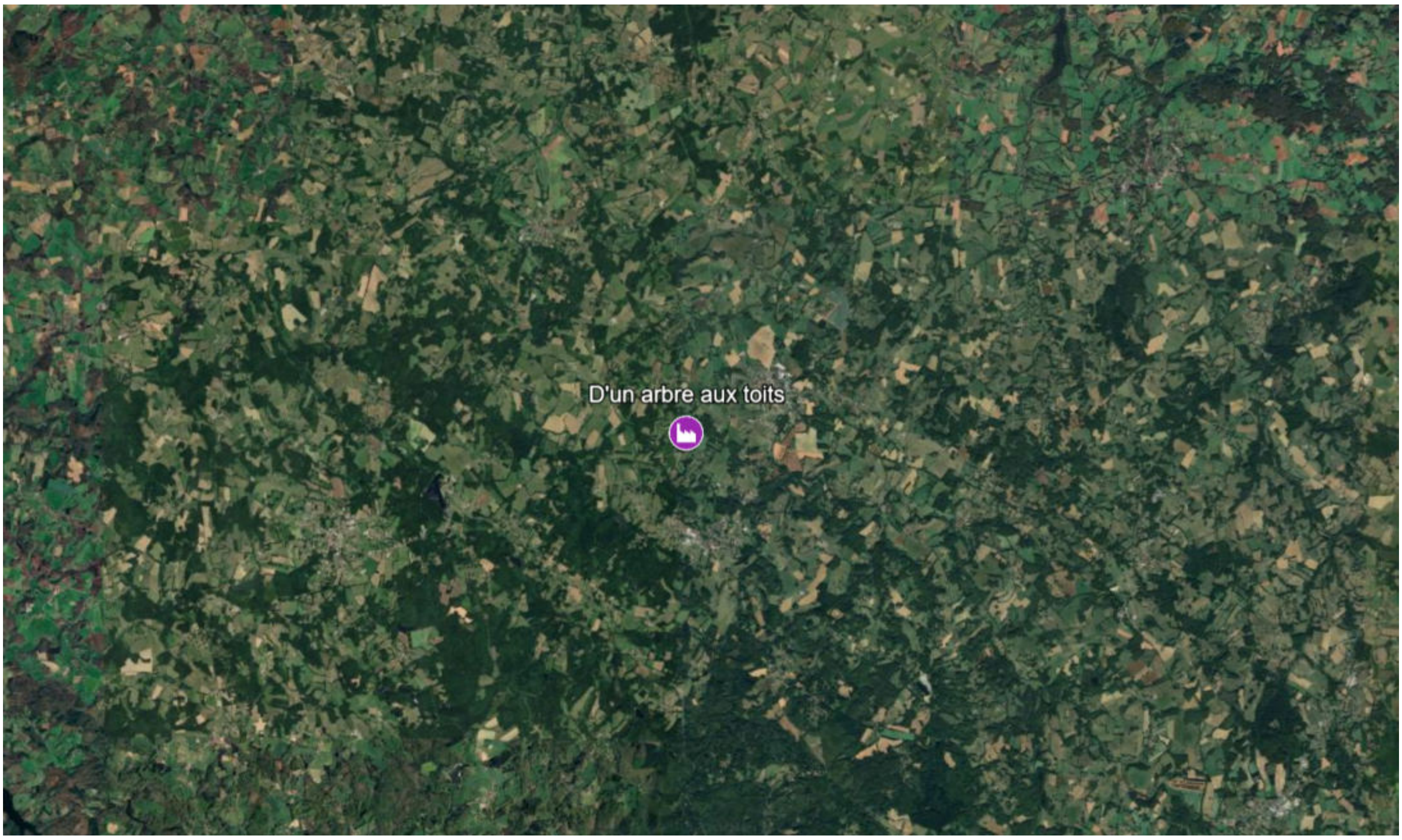
The **company works withing a small network of like-minded local partners**: a one-man traditional sawmill in a neighbouring village provides milling and storage services; a fire-wood producer shares machinery, space and help for lifting objects; independant timber framers join for specific projects.

The workshop and some of the machinery (like this tractor and splitter) is shared with another company producing firewood.

3. DIVERSE SERVICE AND PRODUCT OFFERINGS

D'un Arbre aux Toits mainly offers timber framing services, but also a diversity of other services for both new construction and renovation projects. These services and products include:

- Traditional timber framing (charpente traditionnelle).
- Roofing and zinc work (couverture, zinguerie).
- Manufacturing and/or installing joinery (menuiserie), such as doors, windows, and interior elements.
- Stairs.



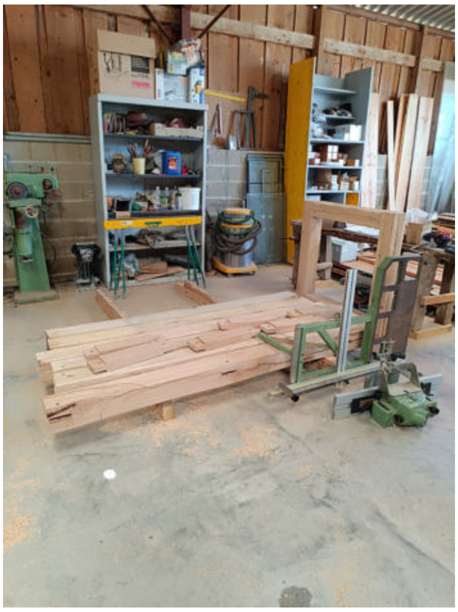
- Bio-sourced insulation.
- Creating wall openings.
- Interior fittings, including custom-made oak tables, libraries, and oak/Douglas fir cladding.
- Exterior fittings, such as raw oak pergolas and raw Douglas fir terraces.

- Renovation services, like joist reinforcement, barn cladding with window installation, complete roof renovations, and the transformation of farms for habitable attics.
- Sale of structural timber (bois d'œuvre) and square-edged timber (voliges, planks).

4. BUSINESS MODEL AND STRATEGIC FOCUS

D'un Arbre aux Toits operates on an artisan-led model that emerged from a direct market need, specifically from local carpenters seeking a reliable supply of local timber for their framing services. A core aspect of its strategy is the proactive control of local sourcing, aiming to procure wood within a tight 20-kilometer radius of its operations. This commitment to local, short-circuit networks extends to collaborations with local sawmills and firewood producers, with **the intention of fostering a local wood hub** - or bioregional metabolic hub - where space and machinery can be shared.

The **production of local wood in addition to providing timber framing services reflects both a business decision and a value-based mission**: the company's founder and sole sharehodler, the recently converted engineer Thomas Fischer, strives to have an impact on the local ecosystem and allow other carpenters to use local wood; at the same time, selling local timber also allows to create revenue from the fractions of logs he buys for timber framing but that cannot be used as beams.



Work in progress: a timber framing project.

5. DIVERSIFICATION STRATEGY

The company's economic viability relies on a diversification strategy that combines timber framing services with the sale of raw wood (planks, boards). This dual income stream is essential because, without it, any wood not directly usable for timber framing would be wasted, making local sourcing prohibitively expensive. Therefore, selling raw wood, even fractions deemed of "insufficient quality" for primary services, becomes a necessary second revenue stream, ensuring the full utilization of timber and supporting the feasibility of local sourcing. Raw wood is sold directly, without intermediaries, to improve profit margins, though this process is recognized as time-consuming.

6. CHALLENGES

Despite its innovative approach, D'un Arbre aux Toits faces significant challenges. **Scaling the business is difficult, primarily because bringing salaried workers on board is considered risky, costly, and time-consuming, especially in a regulated profession like carpentry.** Furthermore, while there is high regional demand for timber framing, the preference for locally sourced wood is often a "nice-to-have" rather than a "must-have" for clients. This could impact the company's ability to command premium prices for its locally-sourced products, potentially affecting its long-term sustainability. The business model also necessitates a lot of hard work from its team, carrying a risk of burnout.

Conclusion
SYNTHESIS OF CHALLENGES AND STRATEGIES FOR BIOREGIONAL LUMBERYARDS

The four case studies – Hémard & Vignol, Au Coin des Scieurs, Pigearias, and D'un Arbre aux Toits – highlight several common challenges and strategic approaches to running bioregional lumberyards in the Périgord-Limousin region.

Here are the general conclusions drawn from these case studies:

COMMON SOURCING CHALLENGES

A significant shared challenge is the sourcing of raw timber. The forest land ownership in the Périgord and Limousin regions is highly fragmented, with 75% of French forest surface being privately owned, and 90% of forest owners possessing less than 10 hectares. Harvesting is often conducted by paper mills and industrial wood operators through clear-cut operations, which are more cost-effective and efficient in the short term but have negative environmental and economic consequences. This necessitates cooperation with a multitude of small landowners through networks to promote more sustainable forest management, requiring the upskilling of lumberjacks and smaller operations for selective tree harvesting.

DIRECT DISTRIBUTION AS A COMMON THREAD

A consistent theme across all case studies is the focus on direct distribution. Companies like Pigearias emphasize direct sales, primarily B2B, to avoid intermediaries and prevent further erosion of already thin profit margins. This strategy aims to cut out middlemen and enhance control over the distribution process.

PRODUCTION UPON ORDER AND INVENTORY MANAGEMENT

Many companies, including Hémard & Vignol and Pigearias, implement a production-upon-order model to reduce inventory costs and risks. For instance, they only produce fencing or flooring once an order is received and paid for. However, this strategy still necessitates maintaining a stock of logs and intermediate products, leading to high outlays for raw materials and significant space requirements for log storage. Pigearias, for example, maintains a stock of dry sawn timber from various species like chestnut, oak, and pine.

STRATEGIES FOR UTILIZING HETEROGENEOUS WOOD

A universal problem is how to efficiently use all parts of wood with heterogeneous quality. Different companies employ distinct strategies:

- Hémard & Vignol and Pigearias diversify their product offerings from the same wood species (chestnut for Hémard & Vignol, oak for Pigearias) to achieve optimal yield and ensure "no waste," utilizing every fraction for its highest value. Pigearias prioritizes larger sections and A-quality planks, then produces variable-length parquet to maximize yield and eliminate defects.
- Au Coin des Scieurs addresses this by passing losses down to clients of custom milling services, invoicing by the hour rather than by yield or quantity. This model focuses on selling services rather than fixed products.
- D'un Arbre aux Toits combines timber framing services (using internally sourced wood) with the sale of raw wood from fractions that cannot be used for framing. This second income stream is crucial to offset the high cost of local sourcing and ensure full utilization of the timber.

DIVERSITY OF LEGAL FORMS AND ECONOMIC STRATEGIES FOR PROFITABILITY

The case studies showcase a variety of legal forms and economic strategies to tackle the prevalent challenge of low profitability within the sector.

- Hémard & Vignol focuses on scale and efficiency, being a SAS (Société par actions simplifiée) with 39 employees and a four-generation history, despite fluctuating net results and high investment needs.
- Au Coin des Scieurs, an association, relies on a non-profit model, subsidies, festivals, and volunteer activities. Its demand-driven emergence, serving local carpenters, means it doesn't need to stock products.
- Pigearias, a SARL (société à responsabilité limitée), maintains low costs and internal efficiency through direct management by the owner, Jean-Sylvain Pigearias, and a focus on production-upon-order B2B distirbution, though it faces low profitability and high risk.
- D'un Arbre aux Toits, a SASU (société par actions simplifiée unipersonnelle), emphasizes internal efficiency, local networking, and synergies with other activities like a firewood producer, sharing space and machines to create a local wood hub.

CHALLENGES IN SCALING AND LABOR

A recurring challenge is the difficulty in scaling the business, particularly due to the perceived risks, costs, and time involved in hiring salaried workers, especially in regulated professions like carpentry. The models often require a lot of hard work from the core team, carrying a risk of burnout.

DEMAND FOR LOCAL WOOD AS A "NICE-TO-HAVE"

While there's high regional demand for timber framing, the demand for locally sourced wood is often a "nice-to-have" rather than a "must-have" for clients. This can impact the ability of companies focused on local sourcing to command premium prices.

OUTLOOK AND RESILIENCE

Despite the significant challenges, these case studies also reveal a resilient and adaptive sector deeply rooted in the Périgord-Limousin region. The collective drive towards high-value products and diversified offerings—ensuring "no waste" and maximizing yield from heterogeneous wood—demonstrates a commitment to economic and environmental sustainability. The emphasis on direct distribution and local networking fosters strong relationships with clients and partners, creating localized, efficient supply chains that cut out intermediaries and maintain control over processes. Furthermore, the emergence of collaborative models like Au Coin des Scieurs and the strategic synergies pursued by D'un Arbre aux Toits highlight an innovative spirit and a willingness to create bioregional wood hubs that serve broader community and ecological goals.

The underlying passion for wood, local craftsmanship, and sustainable forest management, passed down through generations in some cases, provides a strong cultural foundation for future growth and the potential to collectively address the challenges, transforming the sector into a vital component of the region's green economy.

Appendix
LIST OF RELEVANT FOREST-BASED ORGANIZATION

SAWMILLS

- Scierie Castagné – Villefranche-du-Périgord (Dordogne)
https://www.parquets-castagne.com/
- Scierie de Miremont – Lanouaille (Dordogne)
https://www.scieriedemiremont.com/
- Scierie Montbron Écuras – Écuras (Charente)
https://www.scierie-exploitation-charente.com/Accu
- Scierie Aux Bois du Périgord Vert – Chalais (Dordogne)
https://www.parcs-naturels-regionaux.fr/valeurs-parc/artisanat/travail-du-bois/scierie-aux-bois-du-perigord-vert
- Scierie Pigearias / Périgord Parquet – Brantôme – Nontron (Dordogne)
https://www.perigord-parquet.com/
- Scierie Merle et Fils – La Coquille (Dordogne)
https://www.perigord-limousin.fr/vos-demarches-au-quotidien/espaces-entreprises/portraits-de-nos-entreprises/nos-entreprises-ont-du-talent/scierie-merle-a-la-coquille-transformation-dessences-locales-sans-traitement/
- Scierie Bost et Grandchamps – Négrondes (Dordogne)
https://www.perigord-limousin.fr/
- Scierie Duclaux – Corrèze
https://www.scierieduclaux.fr/
- Scierie Labrue – Saillac (Corrèze)
https://valleedordogne.org/
- Sequeira José et Fils – Bourganeuf (Haute-Vienne)
https://www.pagespro.com/
- Kastanevia – Nontron (Dordogne)
https://kastane.fr/kastanevia-2/
Member of the Forest Alternatives Network

WOOD PRODUCT MANUFACTURERS

- Aprobois – Périgord-Limousin
https://aprobois.org/
- Périgord Parquet – Brantôme (Dordogne)
https://www.perigord-parquet.com/
- Le Bois de Poumier – Saint-Yrieix-la-Perche (Limousin)
https://www.le-bois-de-poumier.fr/
- Eco Bois Châtaignier – Périgord/Limousin
https://www.ecoboischataignier.com/
- Atouts Bois – Limousin
https://www.atouts-bois.com/
- Périgord Bois – Périgord
https://www.perigordbois.fr/
- O Création Bois – Location not specified
https://www.ocreationbois.fr/
- Alain Duspasquier / Création Châtaignier – Near Périgord-Limousin
https://creationchataignier.com/

TIMBER FRAMERS & ARTISANS

- Ateliers Hélène Flageul – Limoges (Haute-Vienne)
https://helene-flageul.fr/
- Bois et Charpentes du Périgord – Périgord
https://www.bois-et-charpentes-perigord.fr/
- Charpente Dordogne – Dordogne
https://www.charpentedor.com/
- Les Ateliers Kogei – Périgord-Limousin
https://www.kogei.fr/
- D'un Arbre aux Toits – Location not specified
https://www.d-un-arbre-aux-toits.fr/realisations

SUPPORTING ORGANIZATIONS & NETWORKS

- Aprobois – Federation of wood professionals in Nouvelle-Aquitaine
https://aprobois.org/
- Parc Naturel Régional Périgord-Limousin
https://www.parc-perigord-limousin.fr/

- Châtaigne et Cie – Association supporting chestnut growers and producers
  https://www.chataigneetcie.fr/
- Union Professionnelle Châtaignier Bois Périgord-Limousin
  https://www.upcb-chataignier.fr/fr/les-artisans-p15.html
- Limousin Bois Durable – Sustainable forestry and timber network
  https://www.limousin-bois-durable.fr/
- Réseau pour les Alternatives Forestières (RAF) – Network promoting ecological forestry and rural transition
  https://www.alternativesforestieres.org/
  Additional resources:
  https://ressources.terredeliens.org/les-ressources/reseau-pour-les-alternatives-forestieres-raf
  https://www.coeurdeforet.com/projetfrancesoutienforet
- Fibois Nouvelle-Aquitaine – Regional wood industry interprofessional network
  https://www.fibois-na.fr/
- France Bois Forêt – National interprofessional organization for forest and wood
  https://www.franceboisforet.fr/
- ONF – Office National des Forêts – National public forest agency
  https://www.onf.fr/
- INRAE – National Research Institute for Agriculture, Food and the Environment
  https://www.inrae.fr/

LOCAL ACTION GROUPS (GAL)

- GAL Pays du Périgord Noir – Pays du Périgord Noir, Nouvelle-Aquitaine
  Focus: ecological transition, local supply chains, heritage, mobility, rural services
  https://pays-perigord-noir.com/
- GAL Châtaigneraie Limousine – Haute-Vienne, Nouvelle-Aquitaine
  Focus: circular economy, rural entrepreneurship, sustainable tourism, soft mobility
  https://www.chataigneraielimousine.fr/Programme-europeen-local
- GAL du Périgord Vert – Pays Périgord Vert, Nouvelle-Aquitaine
  Focus: ecological and energy transition, circular economy, short circuits, health
  (Link not specified – can be added if available)

NETWORKING AND ENGAGEMENT OPPORTUNITIES

- "Châtaignier en projets" Salon – Biennial professional event Organized by the Périgord-Limousin Regional Natural Park and the Communauté de Communes des Monts de Châlus
  Focus: development of the chestnut sector and local economic initiatives
  https://fr.wikipedia.org/wiki/Communaut%C3%A9_de_communes_des_monts_de_Ch%C3%A2lus
- Charte Forestière de Territoire – In place since 2004
  Focus: enhancing forest productivity, employment, and multifunctionality
  https://fr.wikipedia.org/wiki/Communaut%C3%A9_de_communes_des_monts_de_Ch%C3%A2lus
- Cœur de Forêt – Forest advocacy and ecological reforestation project
  Mission: restoring biodiversity and improving forest resilience in France
  https://www.coeurdeforet.com/projetfrancesoutienforet


AGIR ENSEMBLE POUR
DES FORÊTS VIVANTES


ET UNE FILIERE BOIS
LOCALE ET SOLIDAIRE