

US West Coast Log/Lumber Export and its implications

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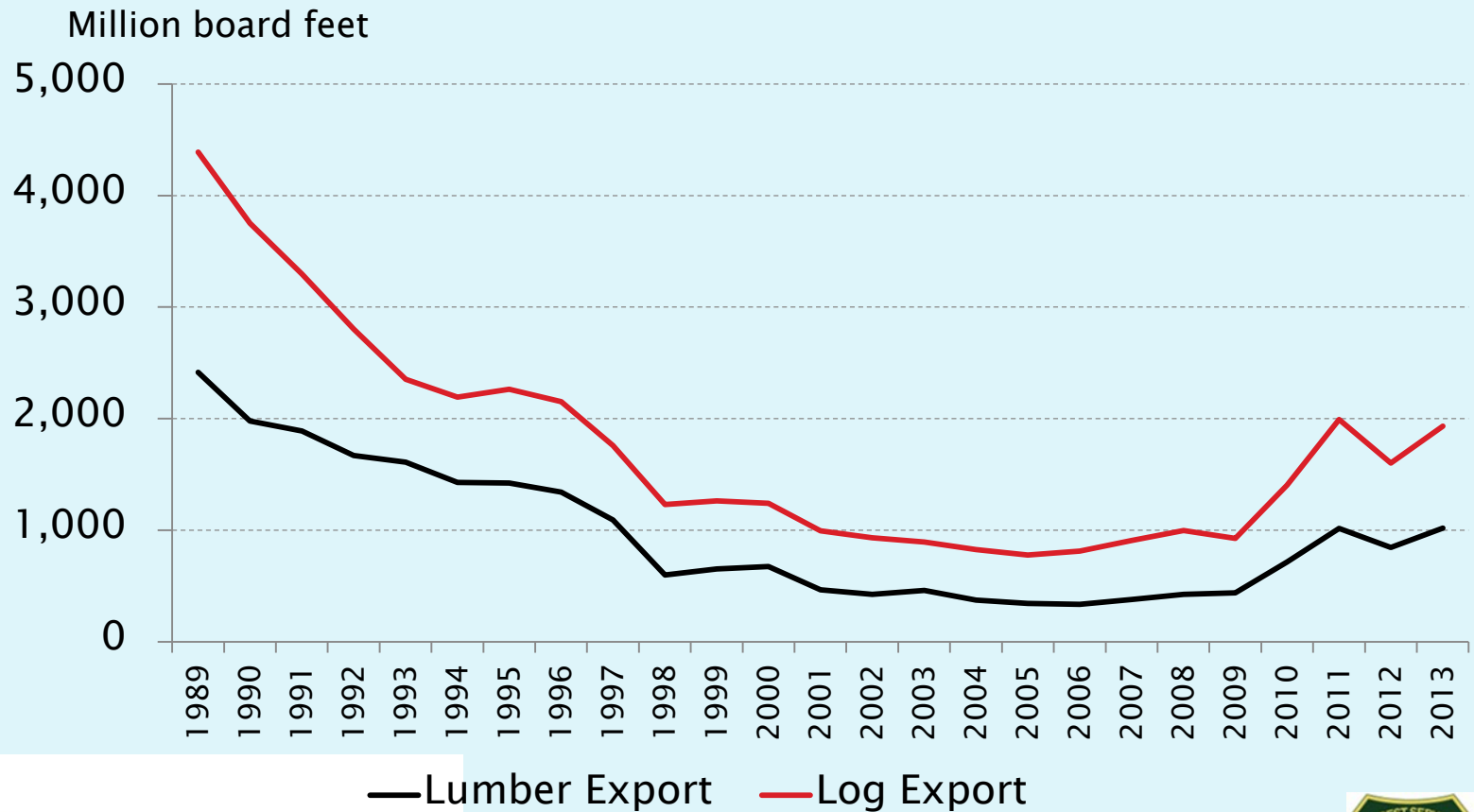


Objectives

- ▶ West Coast log and lumber export and other forest products export trend
- ▶ The importance of the West coast log/lumber export (WA,OR Alaska and Northern California)
- ▶ Some implications
- ▶ Data sources: USITC, WWPA, other federal (US and BC Canada) or state economic data

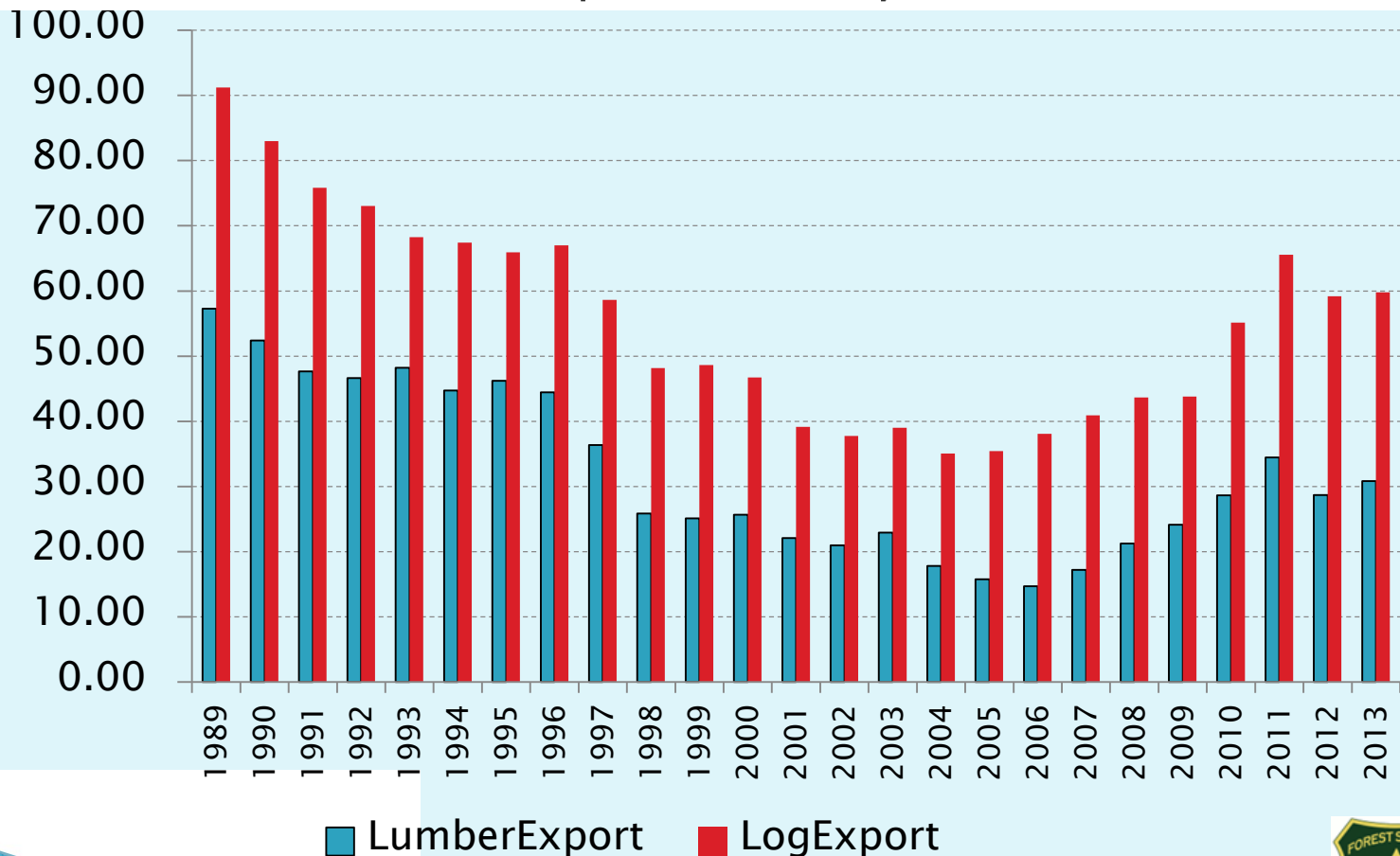


West coast log and lumber export (1989-2013)



West coast log and lumber export relative to total US export

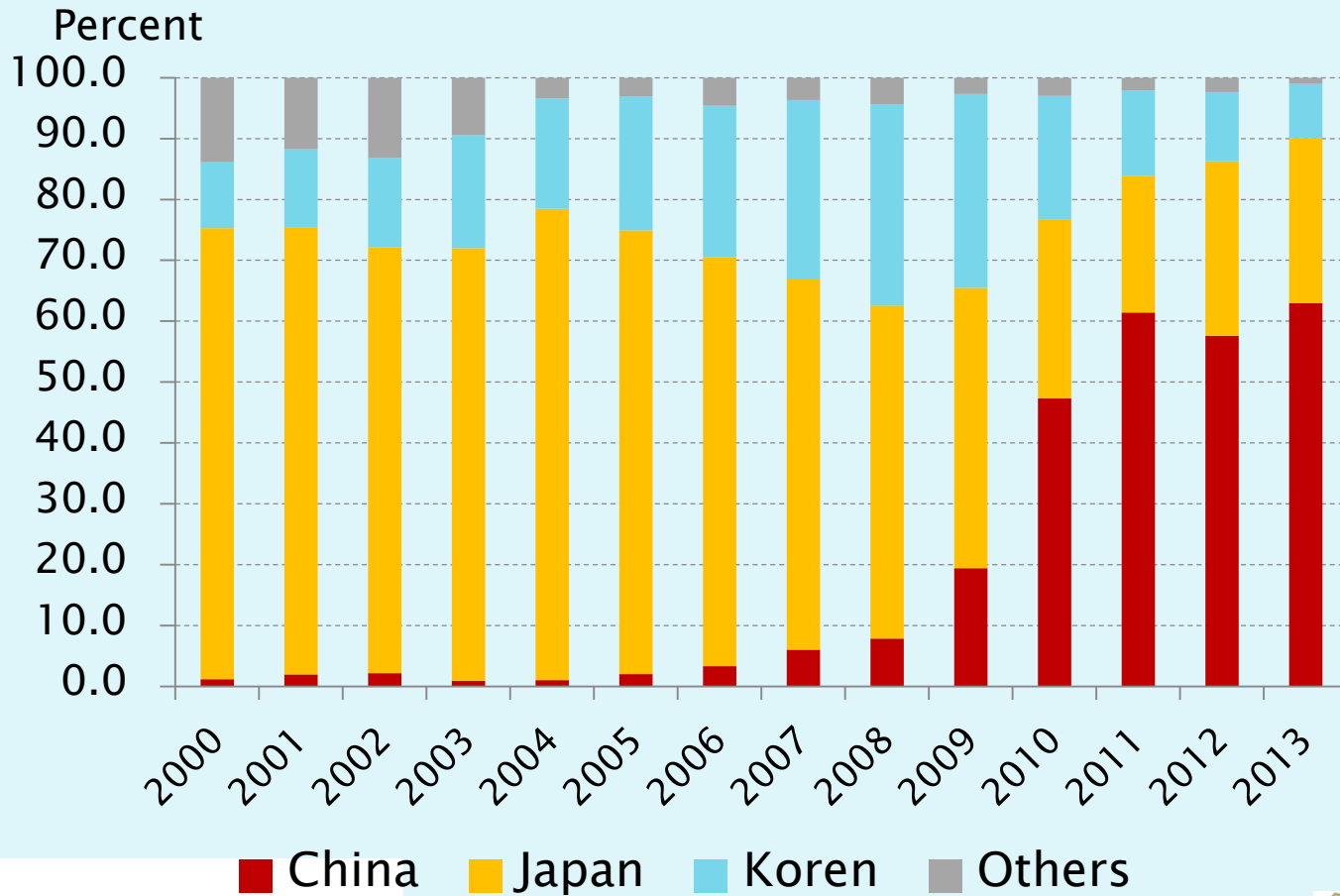
(1989-2013)



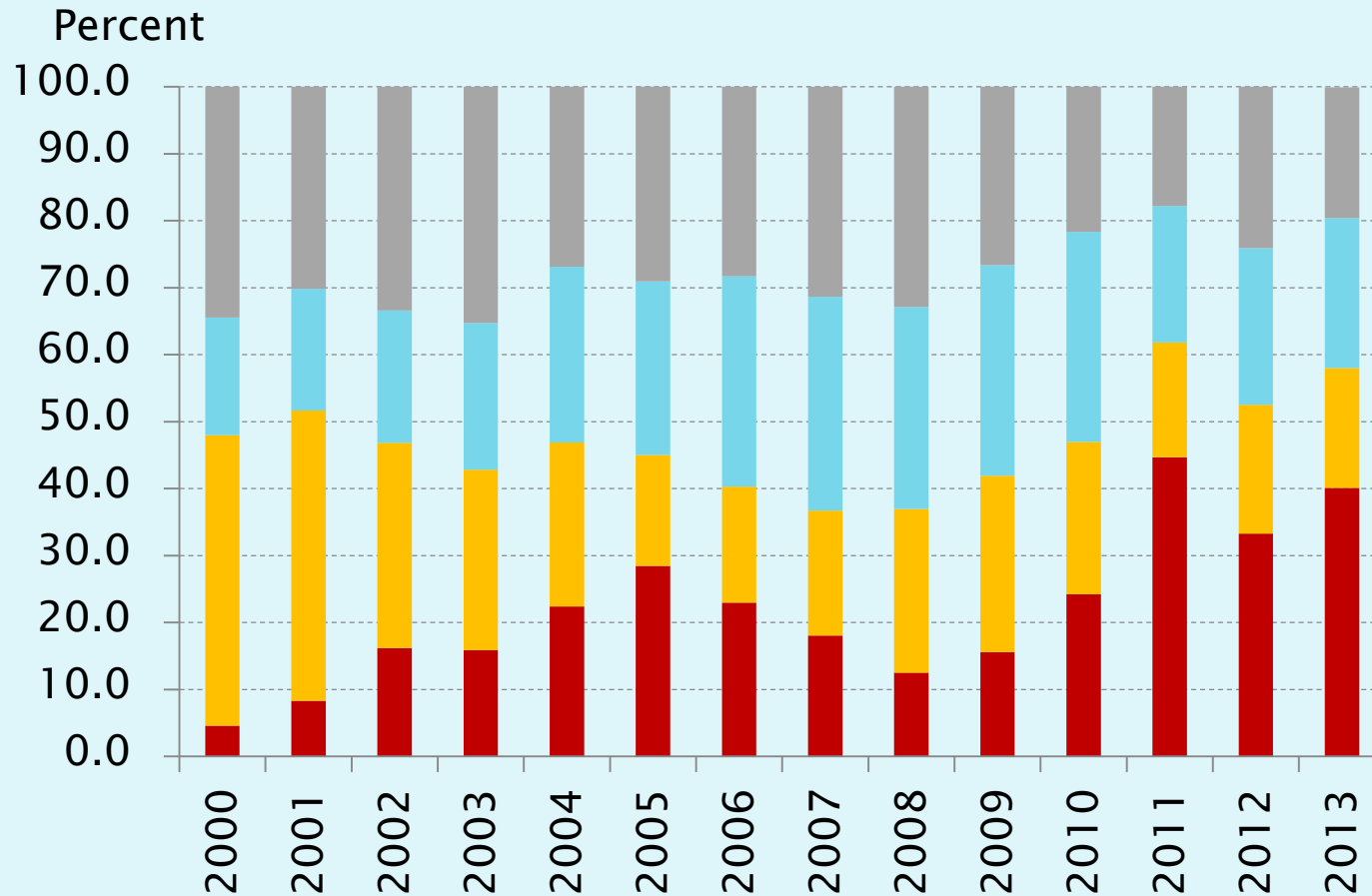
■ LumberExport ■ LogExport



Where the west coast log goes?



Where the west coast lumber goes?

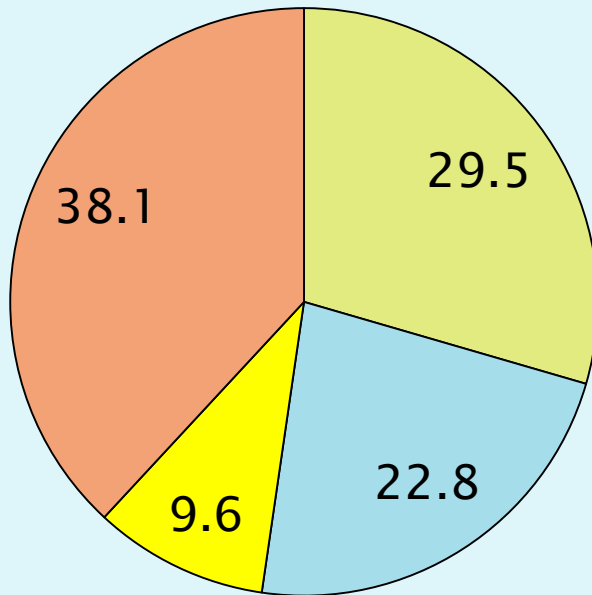


■ China ■ Japan ■ Canada ■ Others



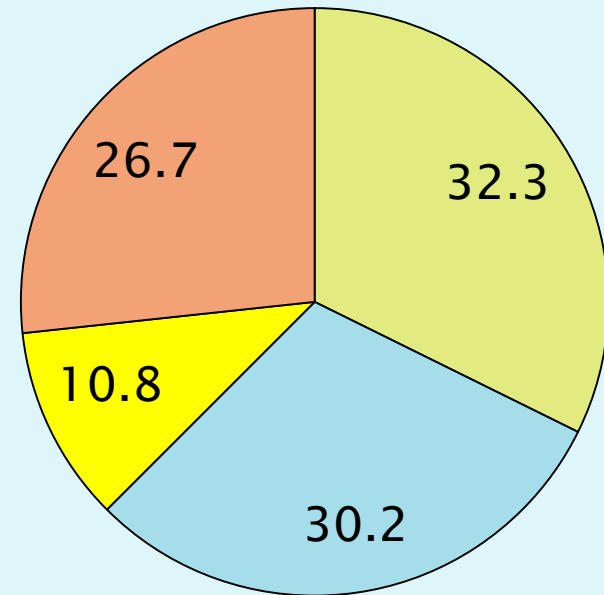
The sources of China's log and lumber importation (%)

2012 Log import



■ Russia ■ New Zealand ■ US ■ Others

2012 Lumber import



■ Canada ■ Russia ■ US ■ Others

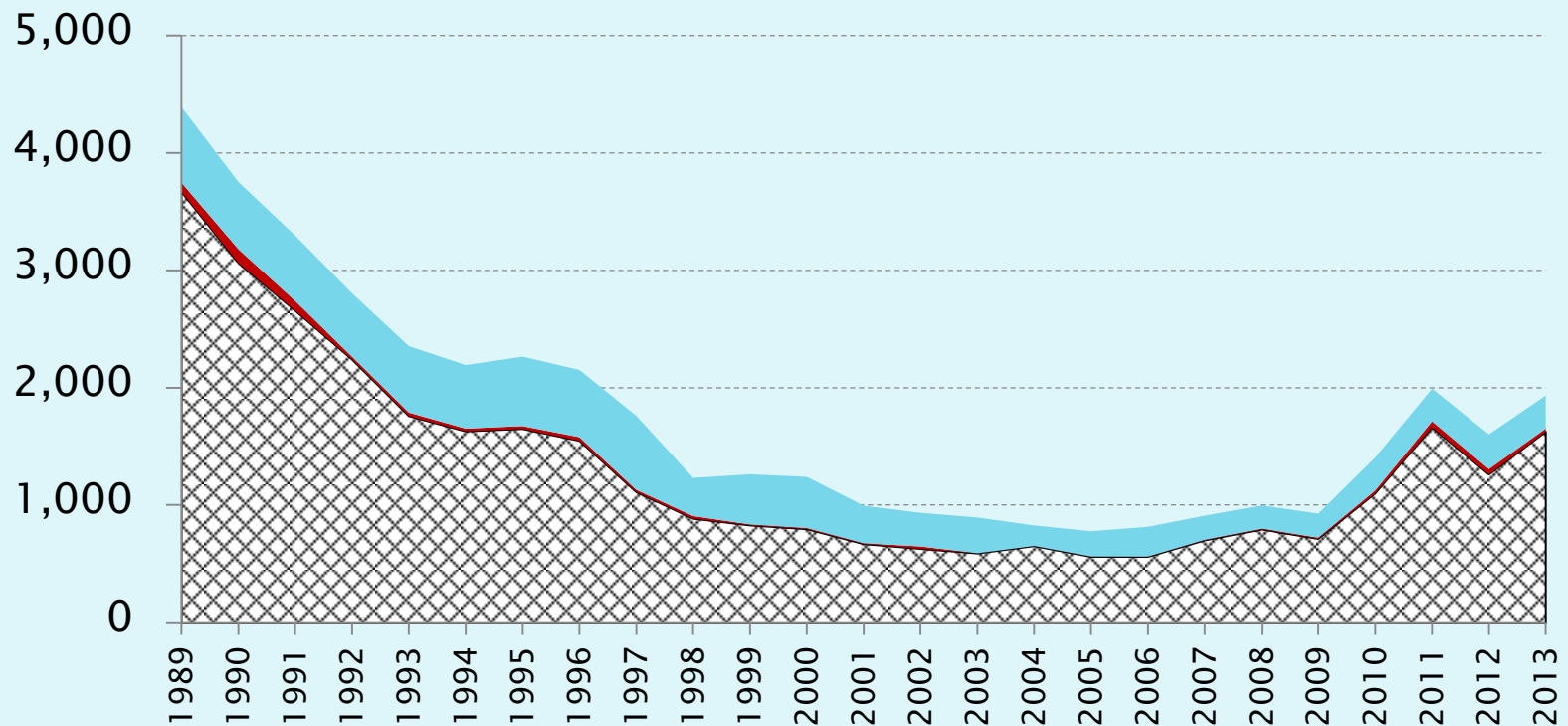
Data source: China TWPDA



West coast log export by Districts

(1989-2013)

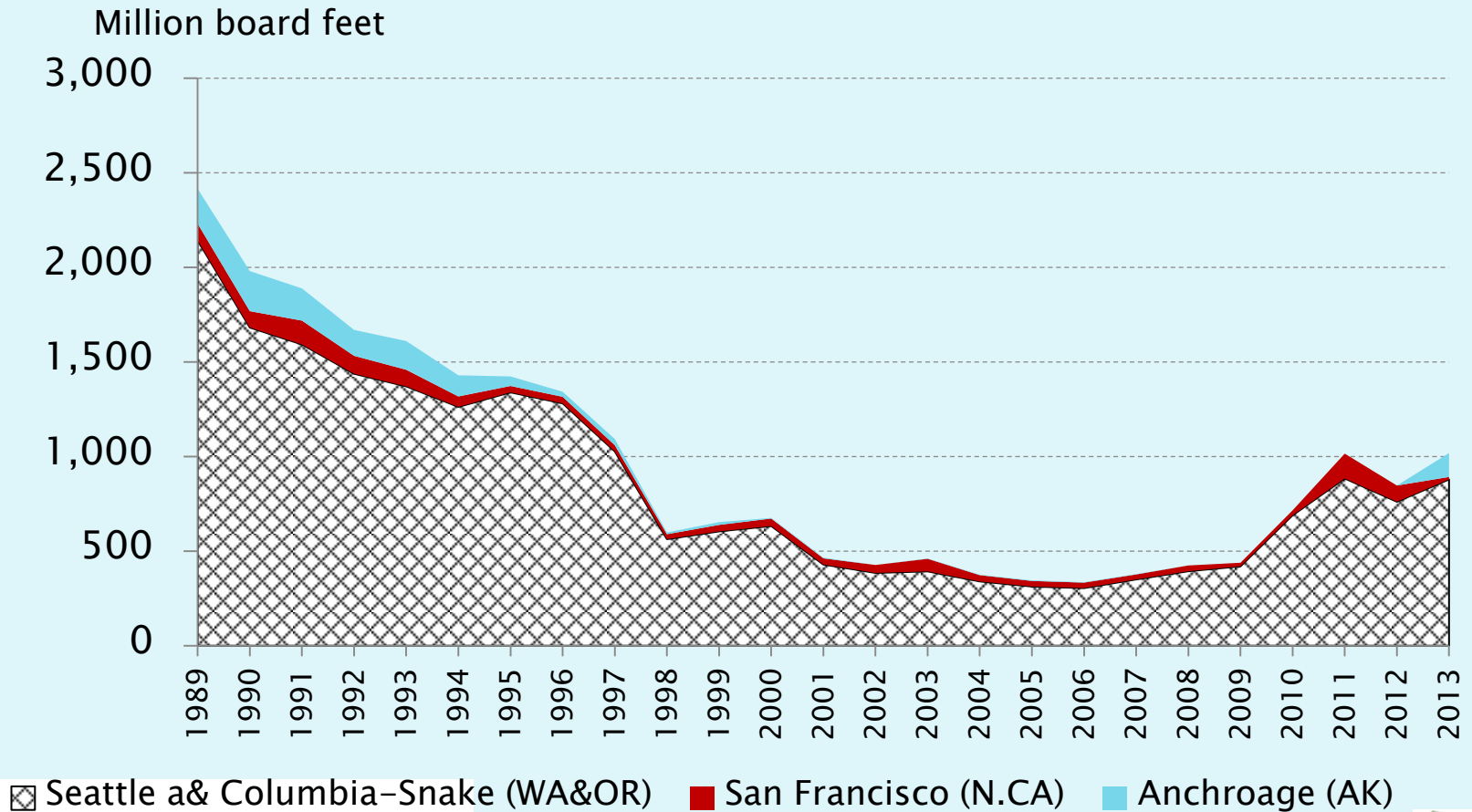
Million board feet



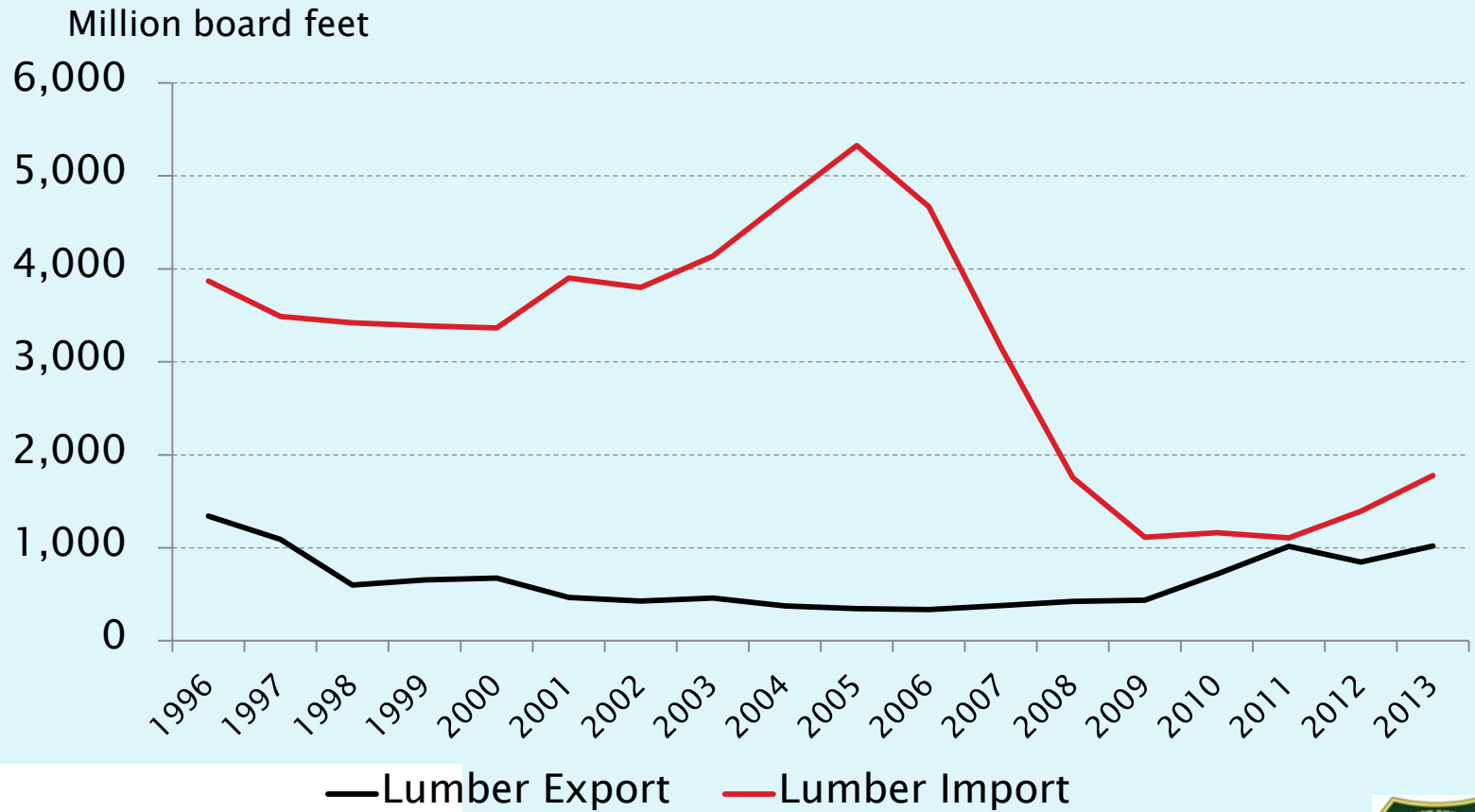
▣ Seattle & Columbia-Snake (WA&OR) ■ San Francisco (N. CA) ■ Anchorage (AK)



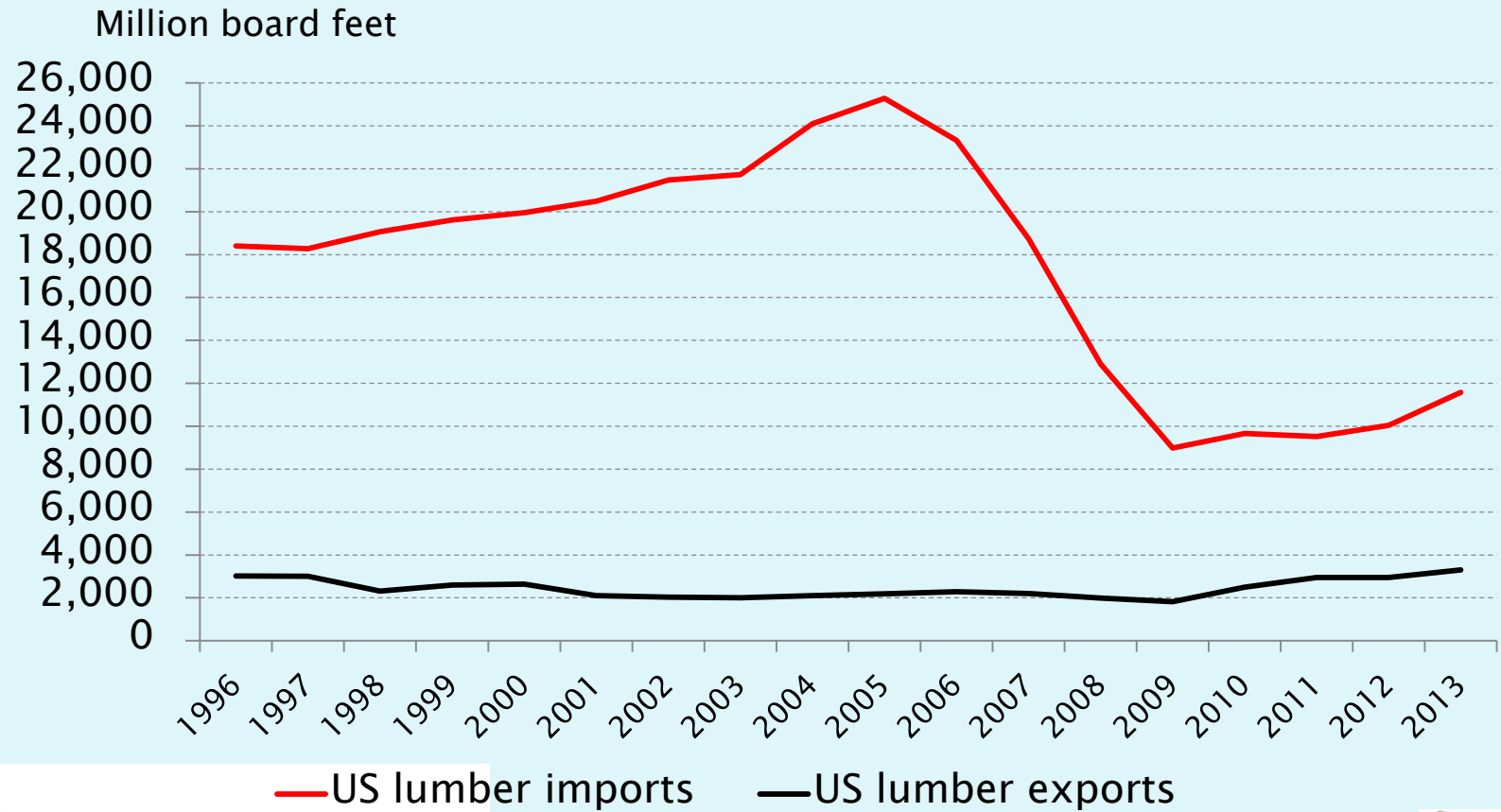
West coast lumber export by districts (1989-2013)



PNW (WA&OR) lumber export and Import (1996-2013)

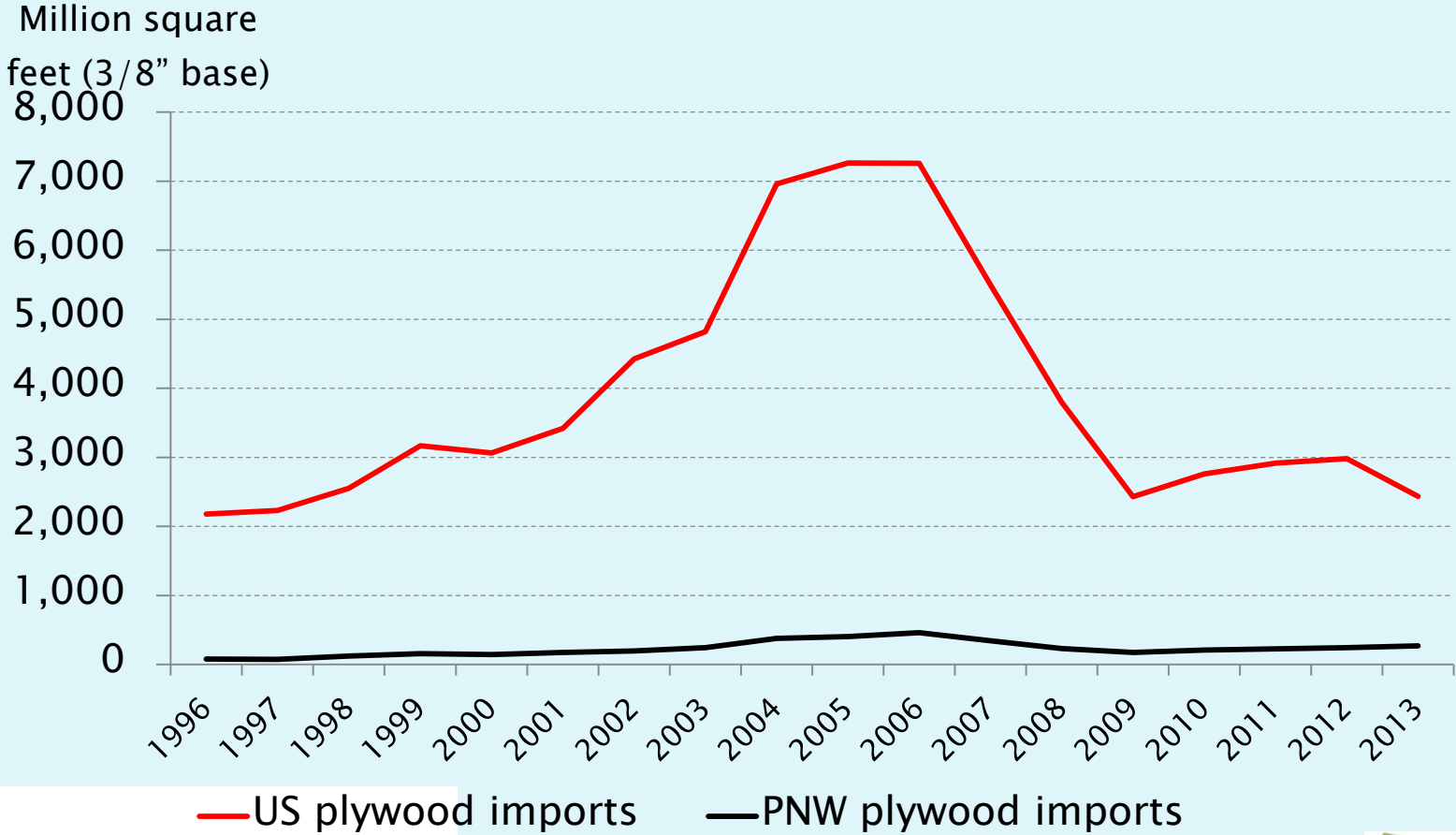


US lumber export and Import (1996-2013)

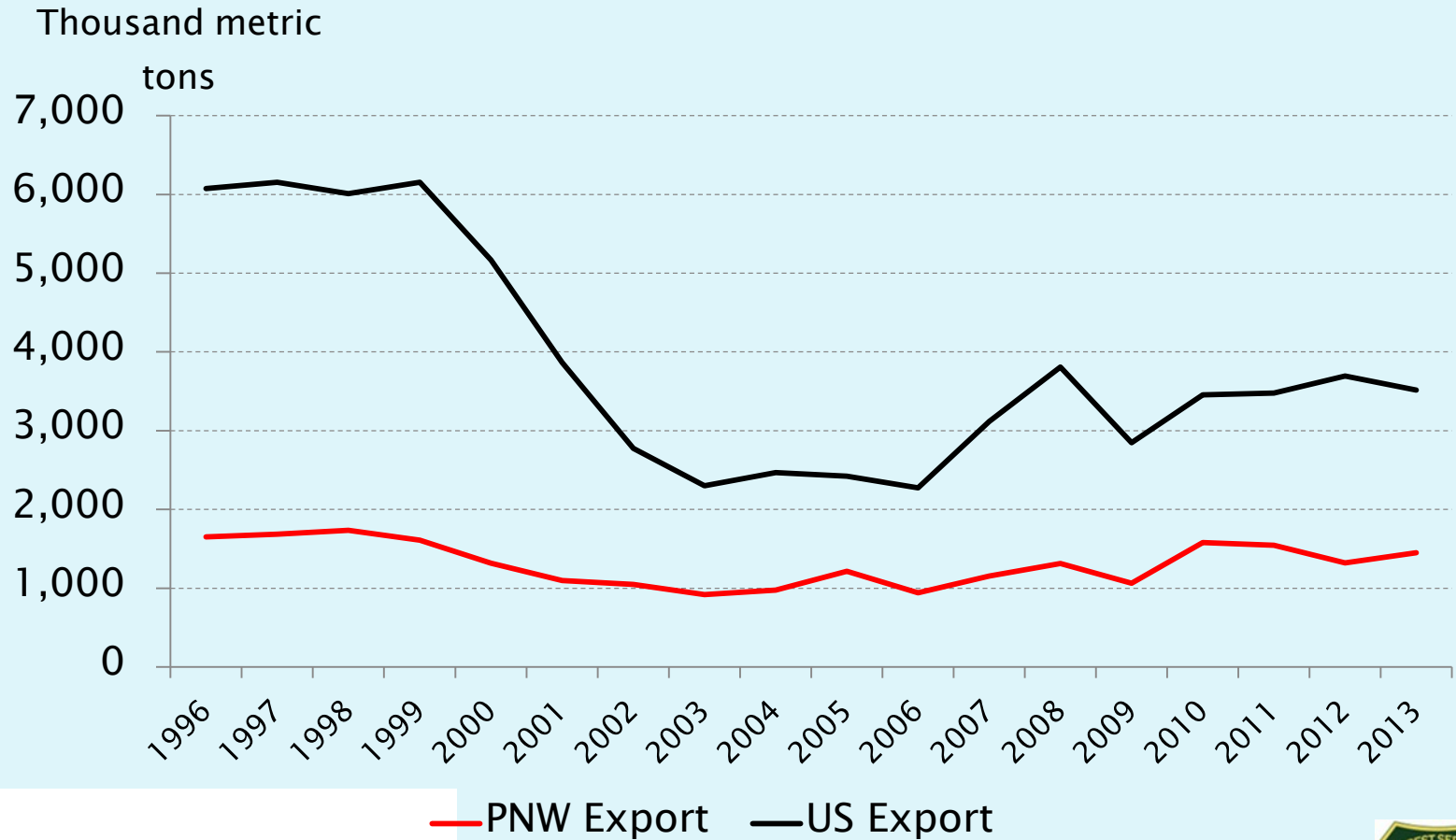


Plywood Imports US vs PNW (OR&WA)

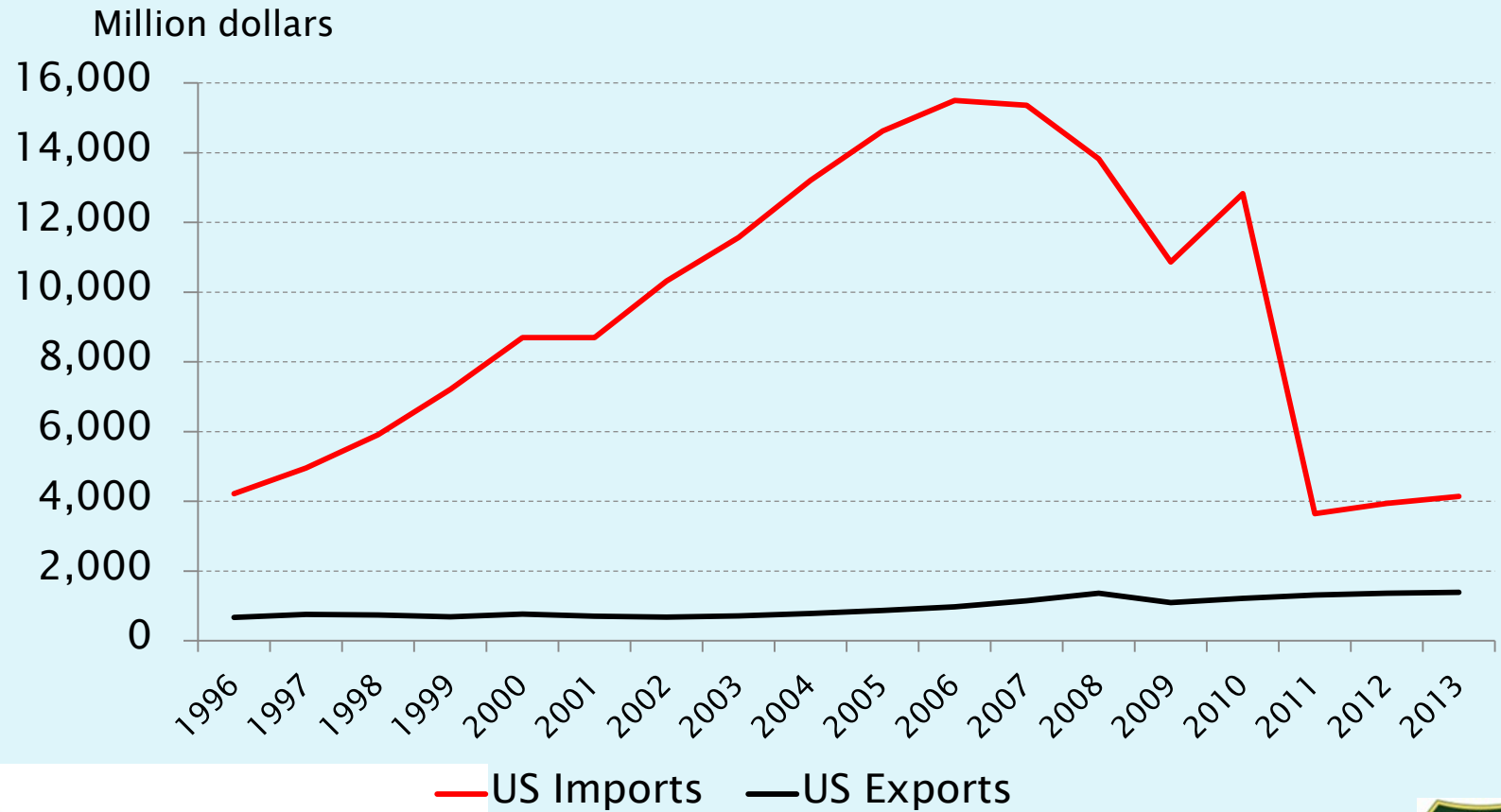
(1996-2013)



Wood Chip Exports US vs. PNW (1996-2013)

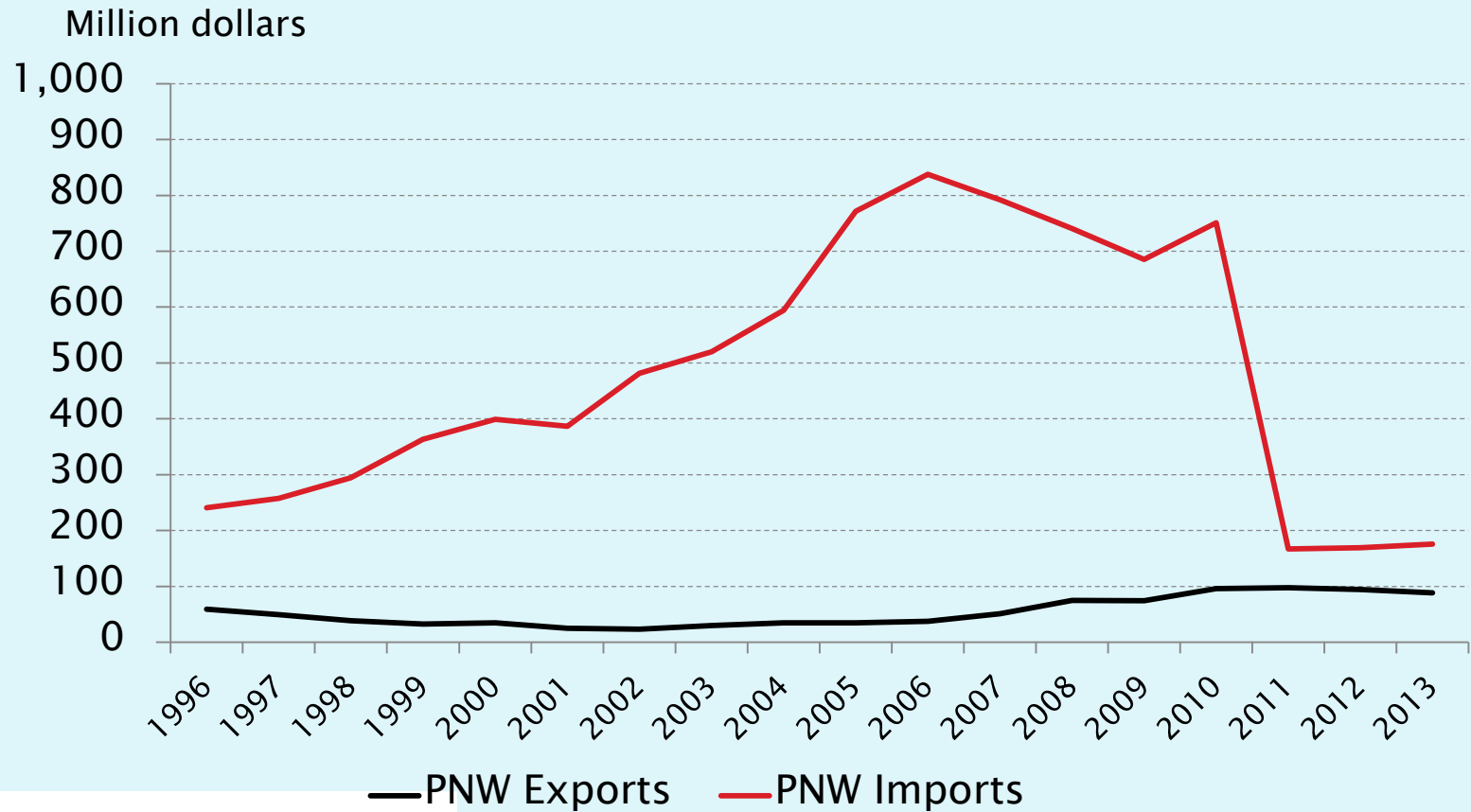


US Wood Furniture export and Import (1996-2013)



PNW Wood Furniture export and Import

(1996-2013)

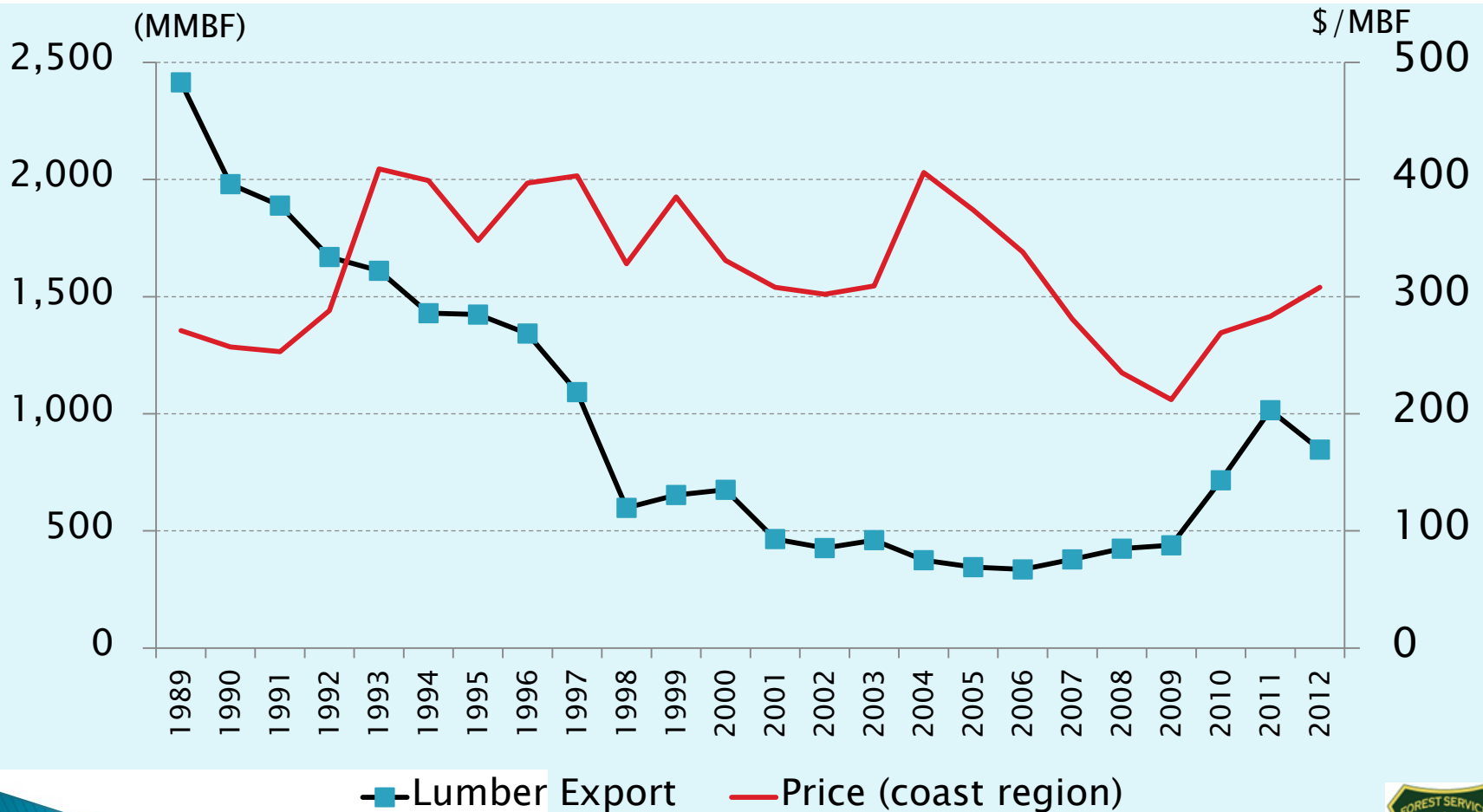


Some facts

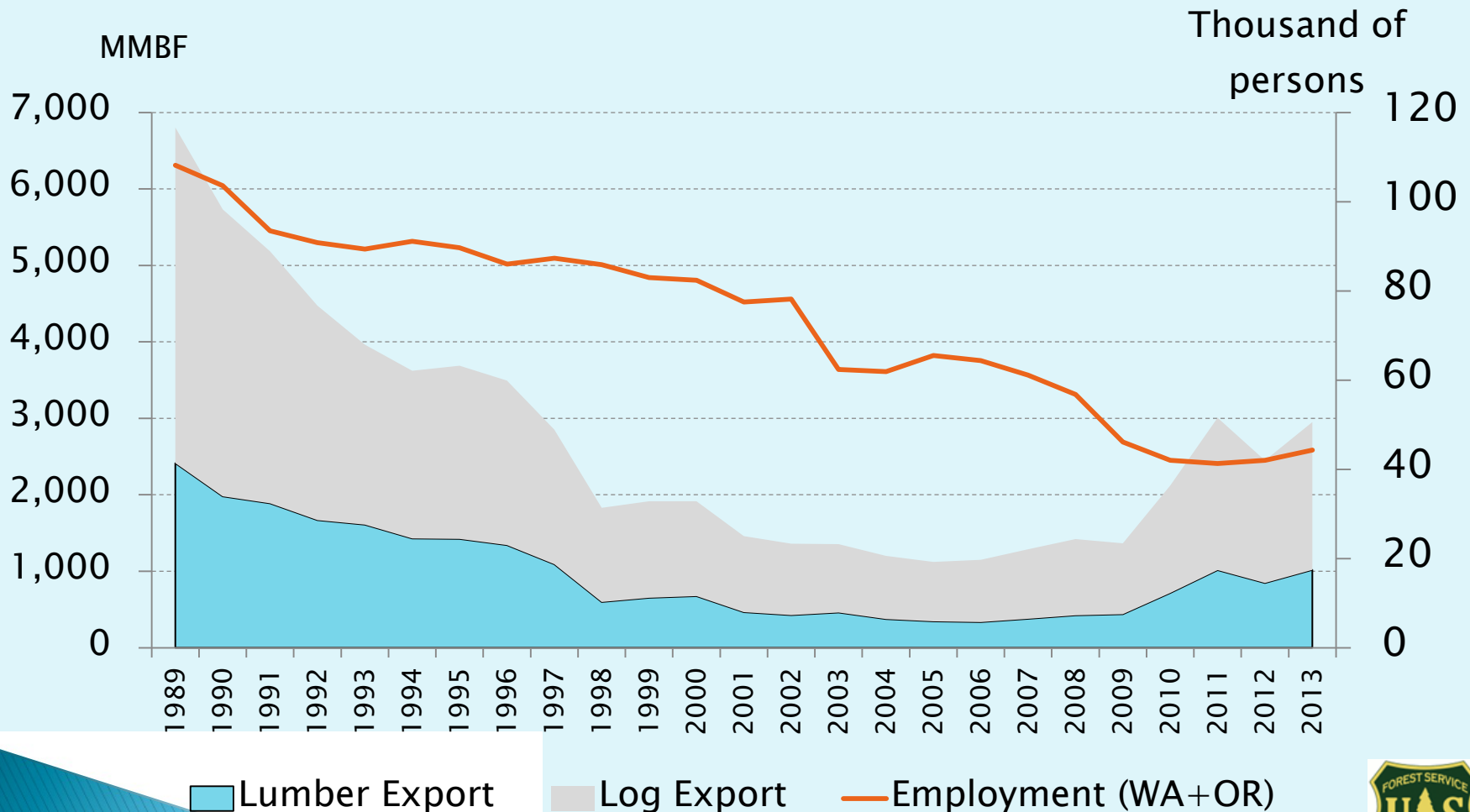
- ▶ Softwood lumber export from WA and OR is about 7% of the total lumber production in 2012 (WA 13% and OR less than 2% (WWPA 2012)
- ▶ Sawmill export: WA 7.9%, OR 3.9% (WWPA2012);
- ▶ Over 98% of the log export and over 87% of the lumber export are softwood
- ▶ China is the major driver for log/lumber export increasing from the west coast as well as US
- ▶ Decreasing imports of wood furniture
- ▶ Wood chip exports stable during the last decade
- ▶ Plywood imports decrease since 2007



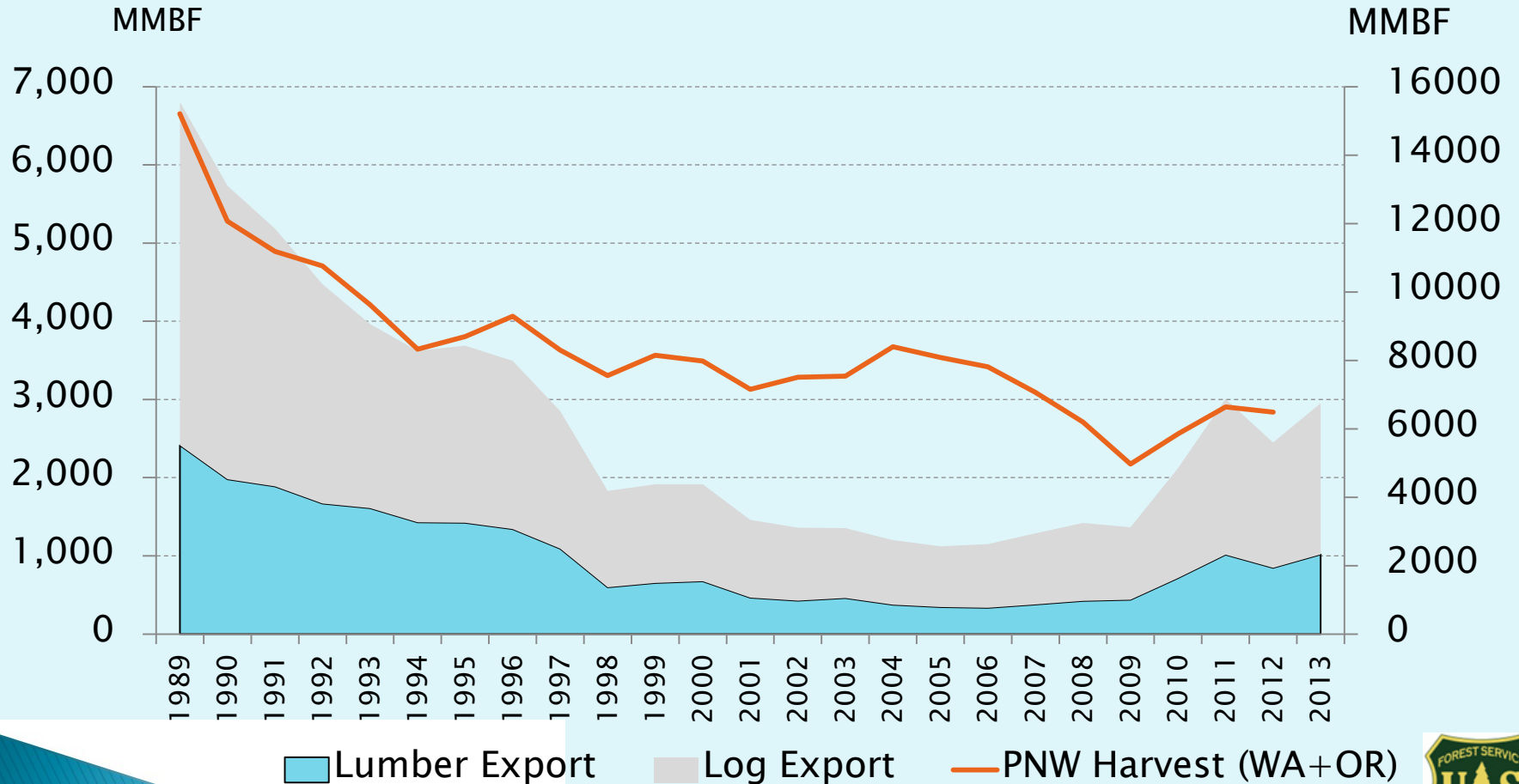
West coast lumber export vs f.o.b. Prices



West coast log/lumber exports vs. employment in lumber and wood products industries



West coast log/lumber exports vs. harvest



More study

- ▶ Export → Jobs? How about mills productivity impact? Domestic demand impact?
- ▶ Wood carbon flow through trade and the impact on the total forest carbon accounting among trading parties in forest sector? (Export wood --- > export carbon?)





United States Department of Agriculture
Forest Service

Pacific Northwest
Research Station

Resource Bulletin
PNW-RB-265

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Production, Prices, Employment, and Trade in Northwest Forest Industries, All Quarters 2012

Xiaoping Zhou

Thank you

Comments or questions?

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Quarterly press release

[http://www.fs.fed.us/pnw/news/2014/02/
log-and-lumber-exports.shtml](http://www.fs.fed.us/pnw/news/2014/02/log-and-lumber-exports.shtml)

Annual publication

http://www.fs.fed.us/pnw/pubs/pnw_rb265.pdf

