

Oregon Forest Industry: A look at Utilization

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On-Going Forest Industry Analysis

University of Montana's Bureau of Business and Economic Research and the USDA, Forest Inventory and Analysis Program in the Rocky Mountain and Pacific Northwest Research stations co-operate to...

Collect, compile, and report detailed information on the operations of the primary forest products industry in the Western States

Periodic Census of a state's industry

- **Data Collected**
 - Timber input (source, log size, etc.)
 - Product output
 - Residue (volume & use)
 - Production capacity (shift & annual)
 - Employment
 - Market area & wholesale value

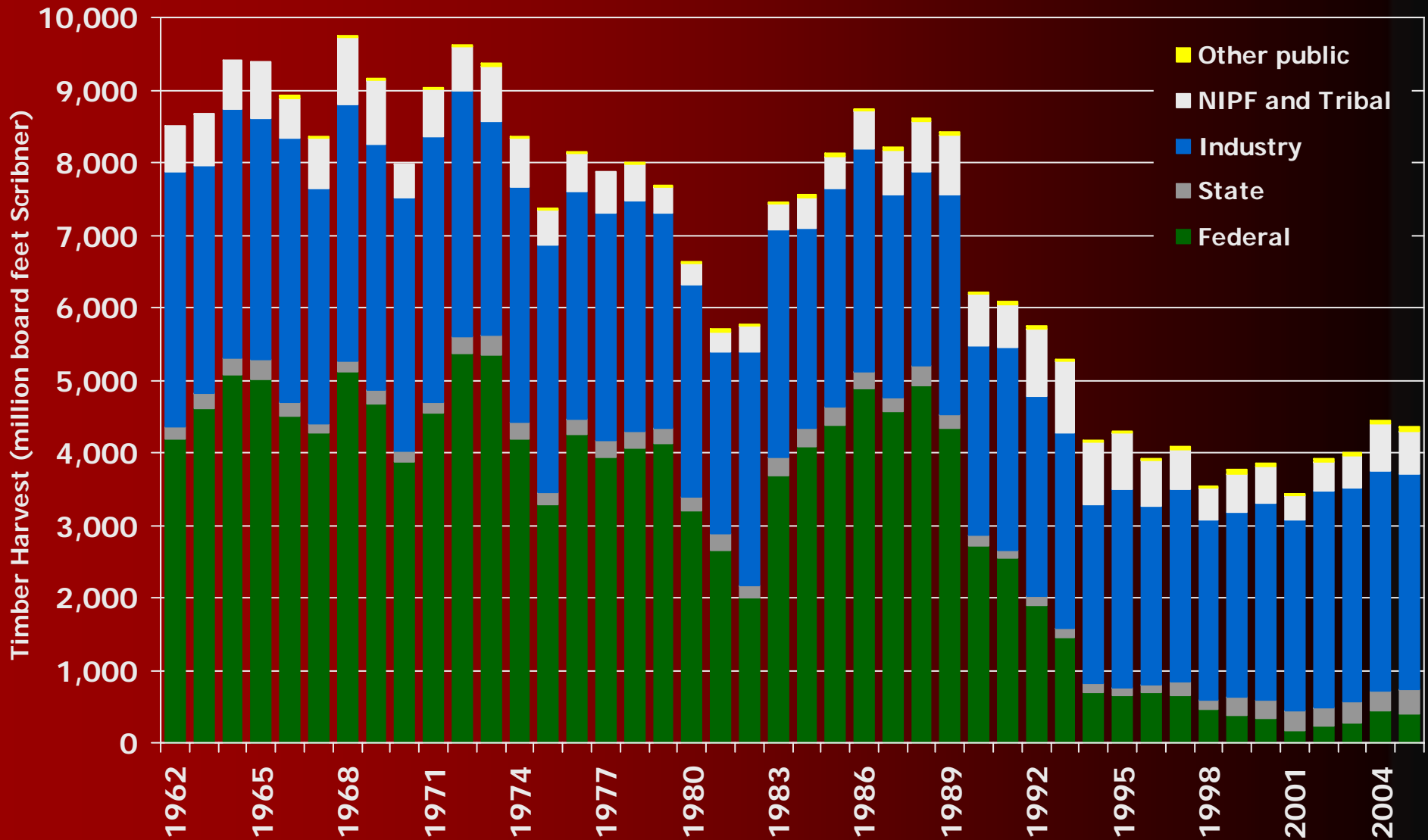
Outputs

- Describe industry condition, capabilities, and trends
- Provide timber product removals and utilization of harvested timber
- Primary product recovery and mill residue output and use
- Track wood fiber from forest to wholesale marketplace
- Relate key economic variables

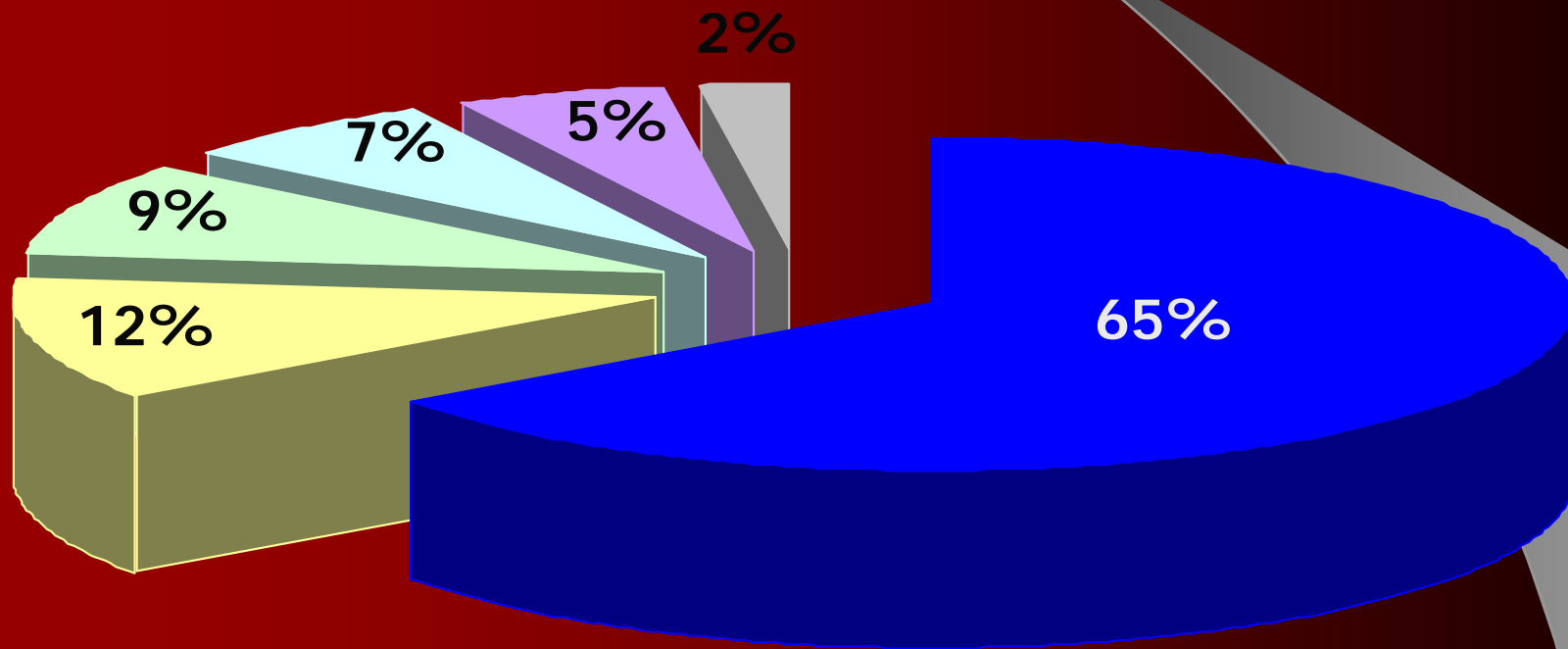
Oregon's Forest Industry

- 250 facilities
- \$7 billion in sales annually
- #1 in U.S. in softwood lumber and structural panel production
- Harvest over 4 billion board feet (Scribner)

Oregon Timber Harvest by Ownership 1962-2005



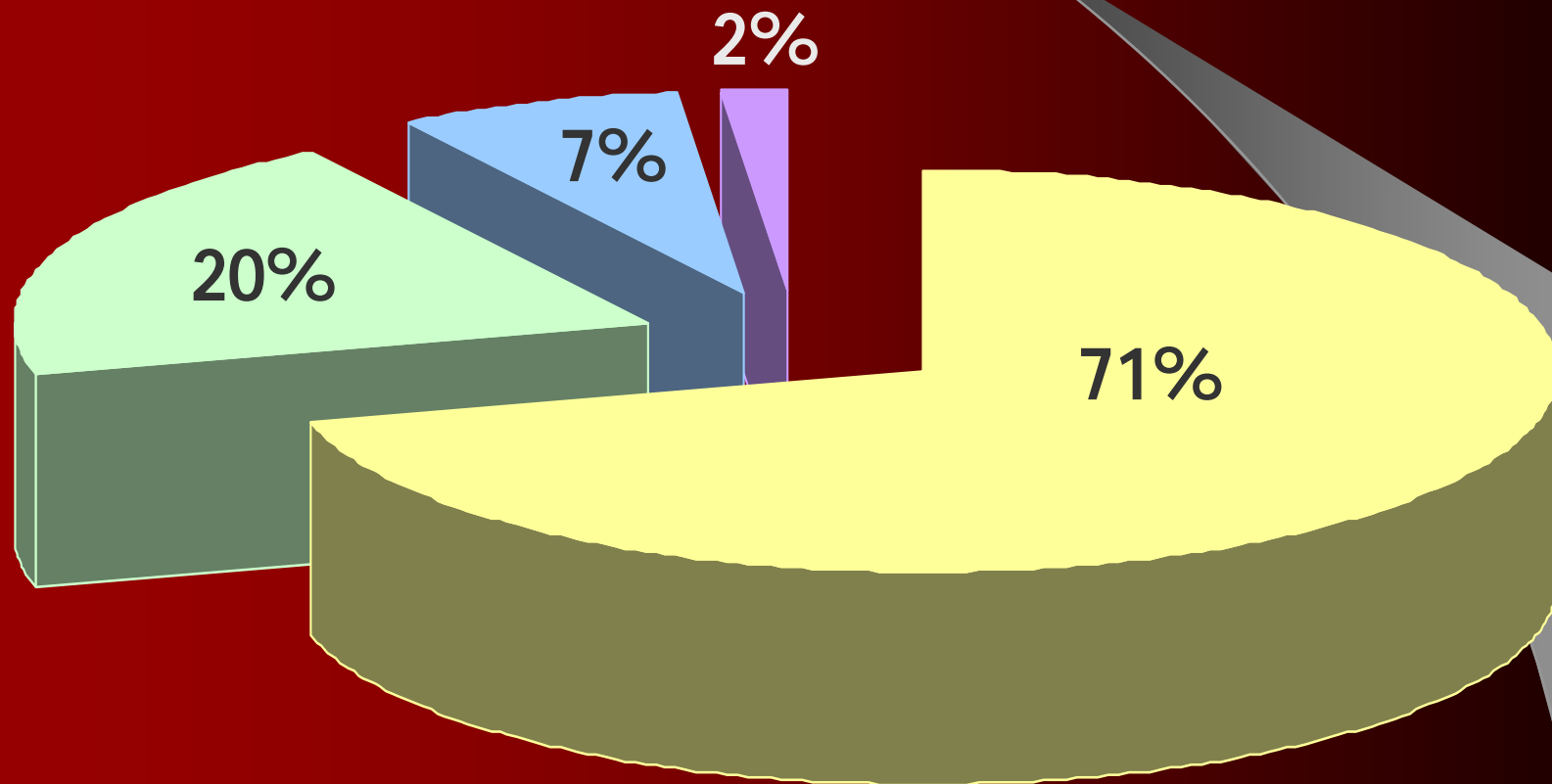
Oregon's Timber Harvest by Species, 2003



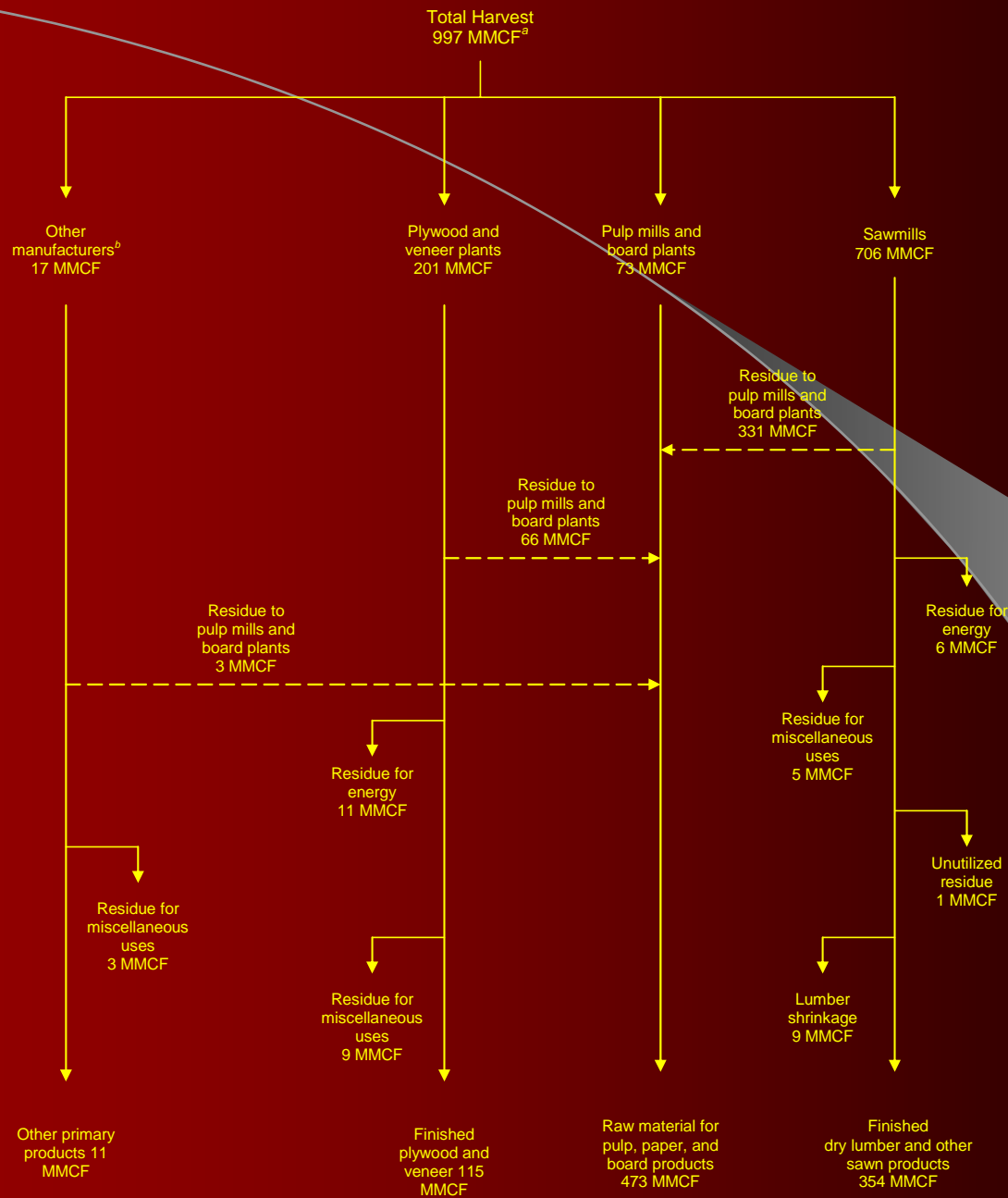
■ Douglas-fir ■ Spruce/hemlock/larch ■ True firs ■ Pine ■ Hardwoods ■ Cedar / juniper

Oregon's Timber Harvest by Product Type, 2003

■ Saw logs ■ Veneer logs ■ Chipped logs ■ Other timber products



Total = 997 MMCF



^a Excluding bark

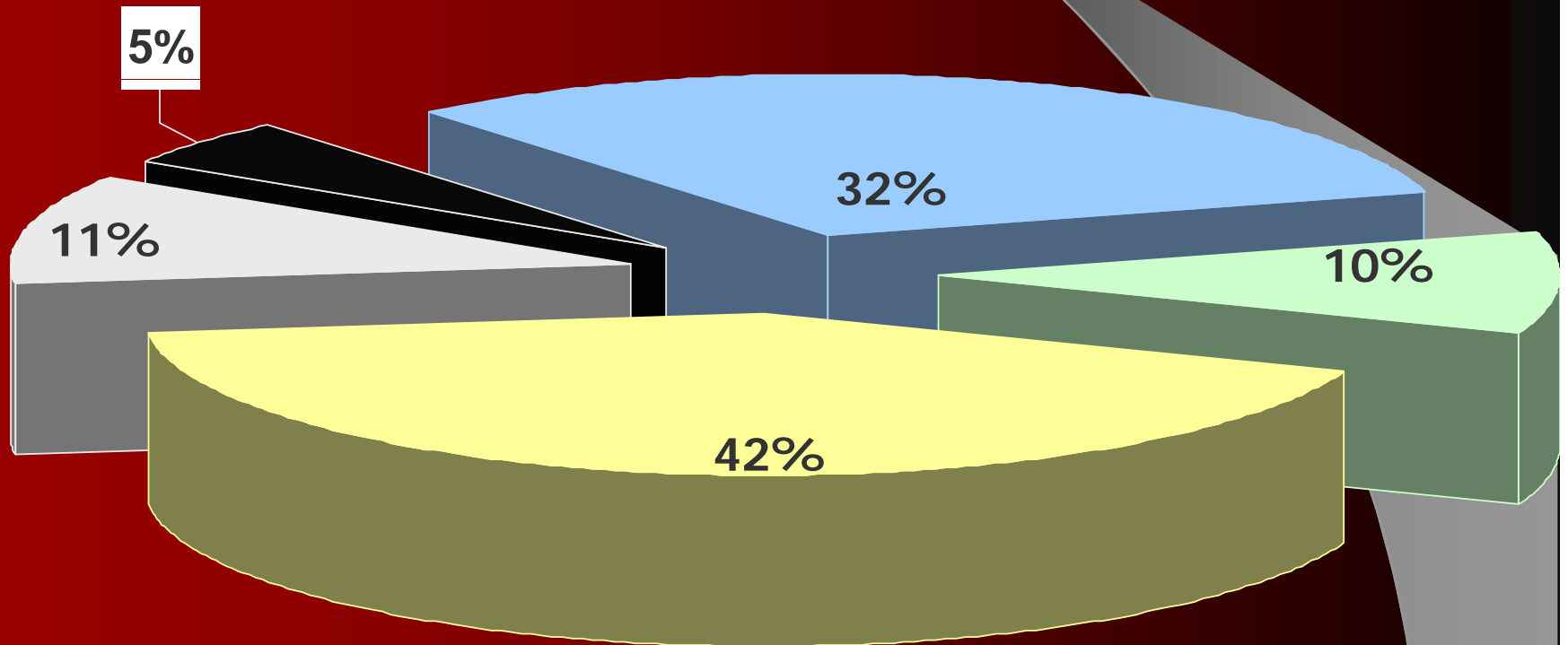
^b Other manufacturers include log furniture manufacturers; house log/log home manufacturers; post, pole, piling, and utility pole; and cedar products manufacturers.

Oregon's Disposition of Wood Fiber, 2003

■ Lumber
■ Fuel

■ Veneer / plywood
■ Other products

■ Paper / board

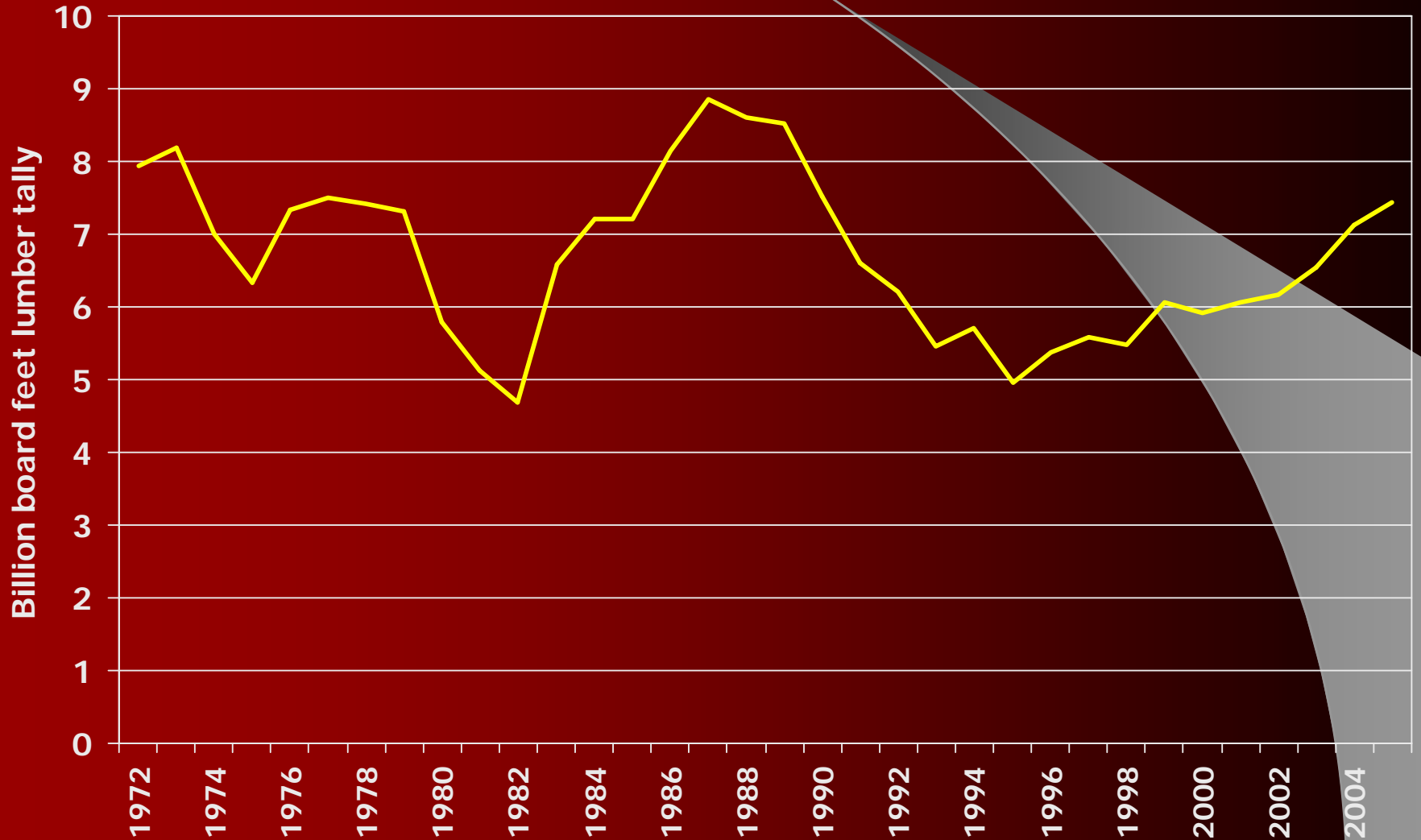


Total = 1,140 MMCF

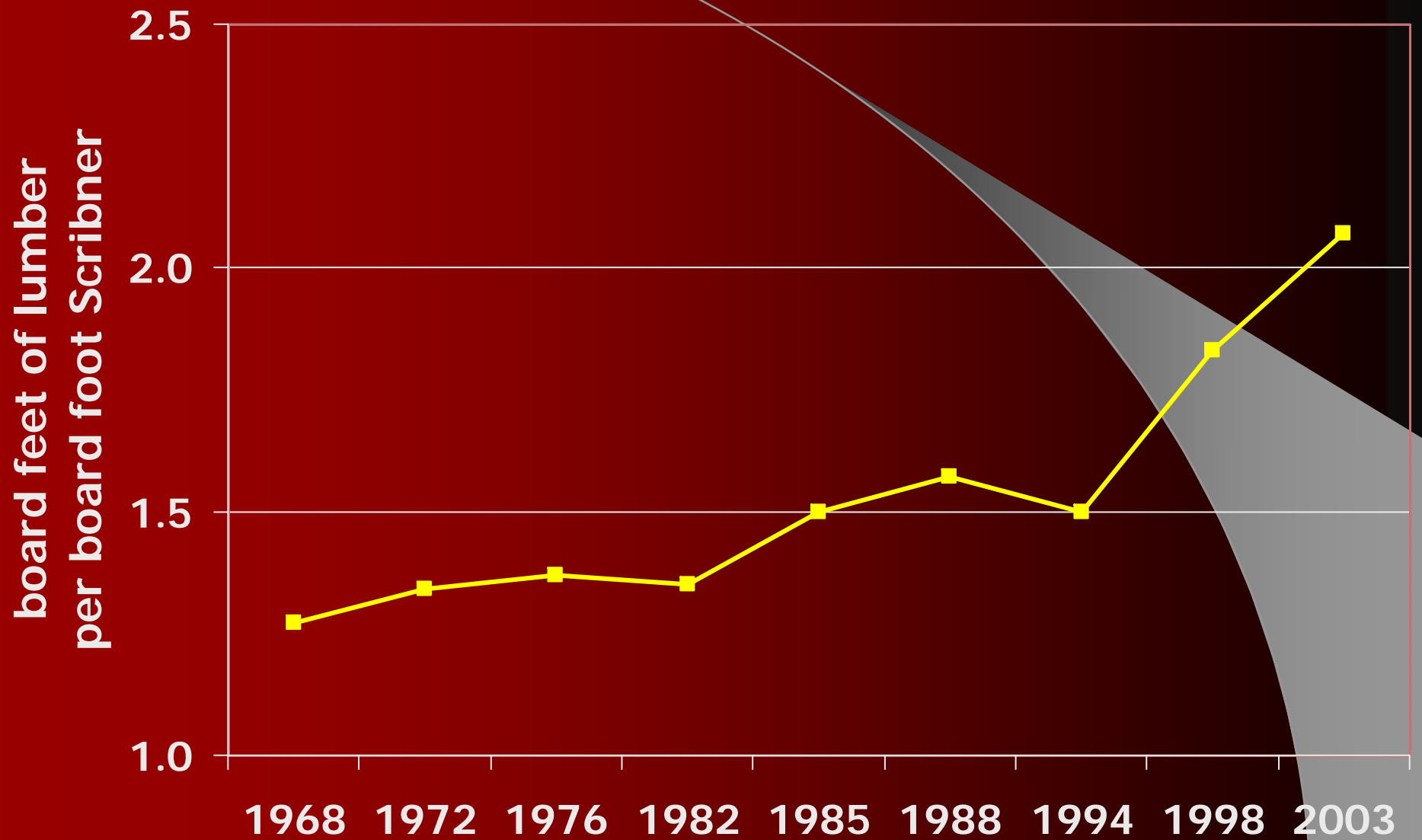
Sawmill Sector

- **126 sawmills operating in 2003**
 - Annual Lumber production 7 billion board lumber tally
 - #1 softwood lumber producing state.

Oregon's Softwood Lumber Production, 1972-2005



Oregon's Lumber Overrun 1968-2003





• LRF 8.6

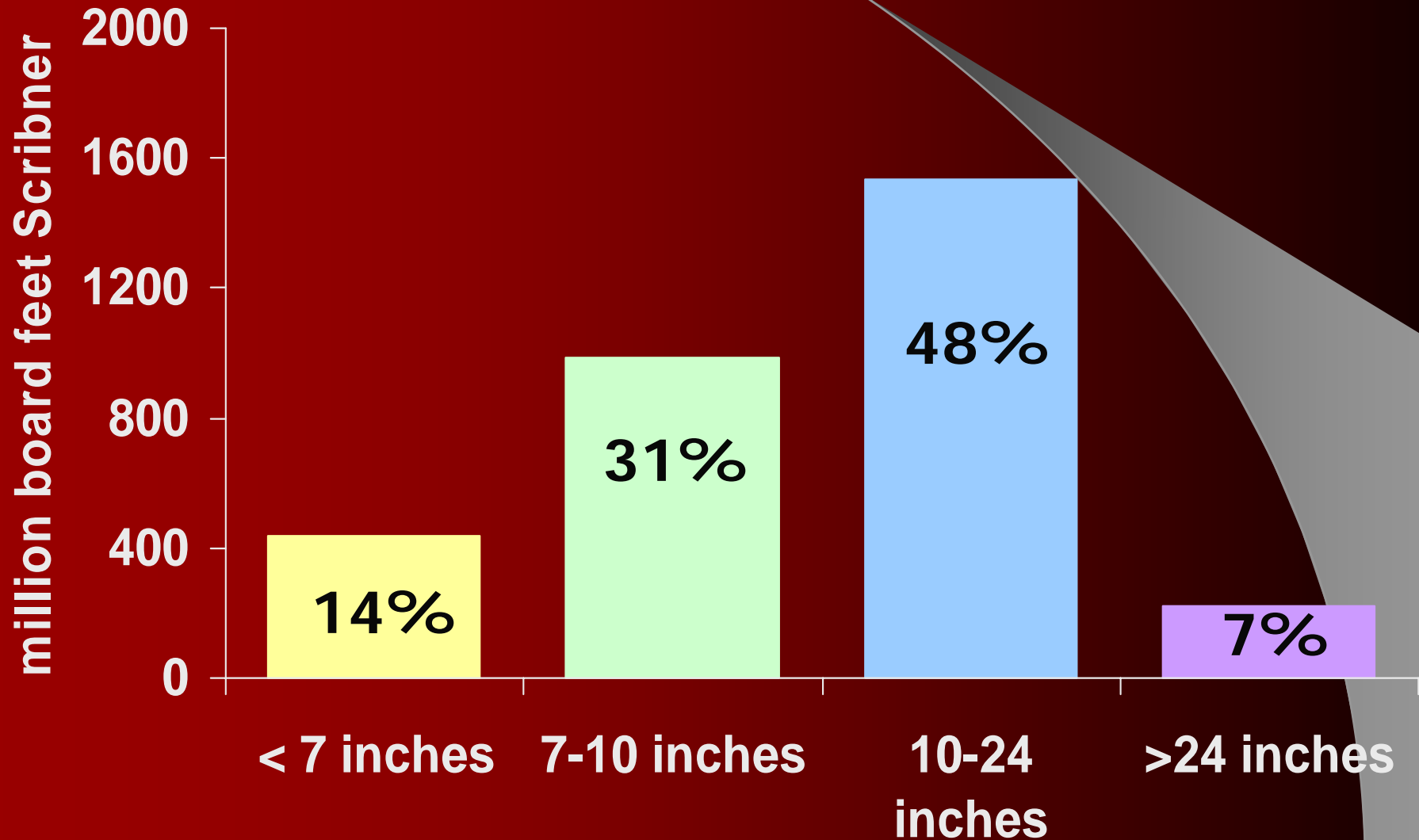
Changes in Oregon sawmill residue factors

(dry tons per MBF lumber tally)

Residue type	1967*	1974-1994*	2003
Coarse	.58	.54	.44
Sawdust	.30	.22	.16
Planer shavings	.22	.21	.10
Bark	.29	.26	.20
Total	1.38	1.23	.90

*Source: 1967 OSU study updated by James Howard in 1974

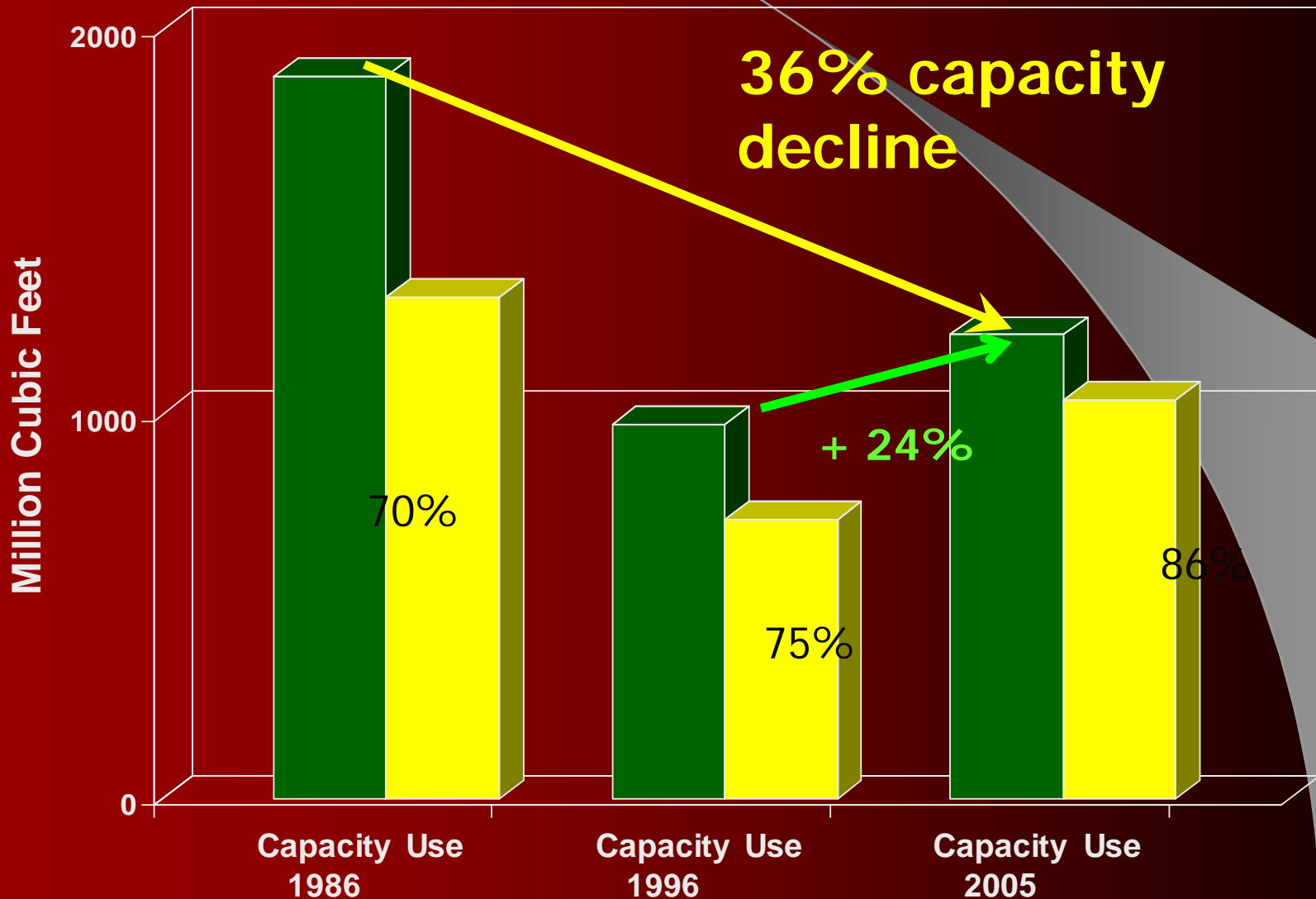
Volume of sawlogs processed by small end diameter, 2003



Log Size

- Most mills able to process logs $>32''$ small end
- Preferred log size $<32''$ small end

Oregon Timber-processing Capacity and Timber Use



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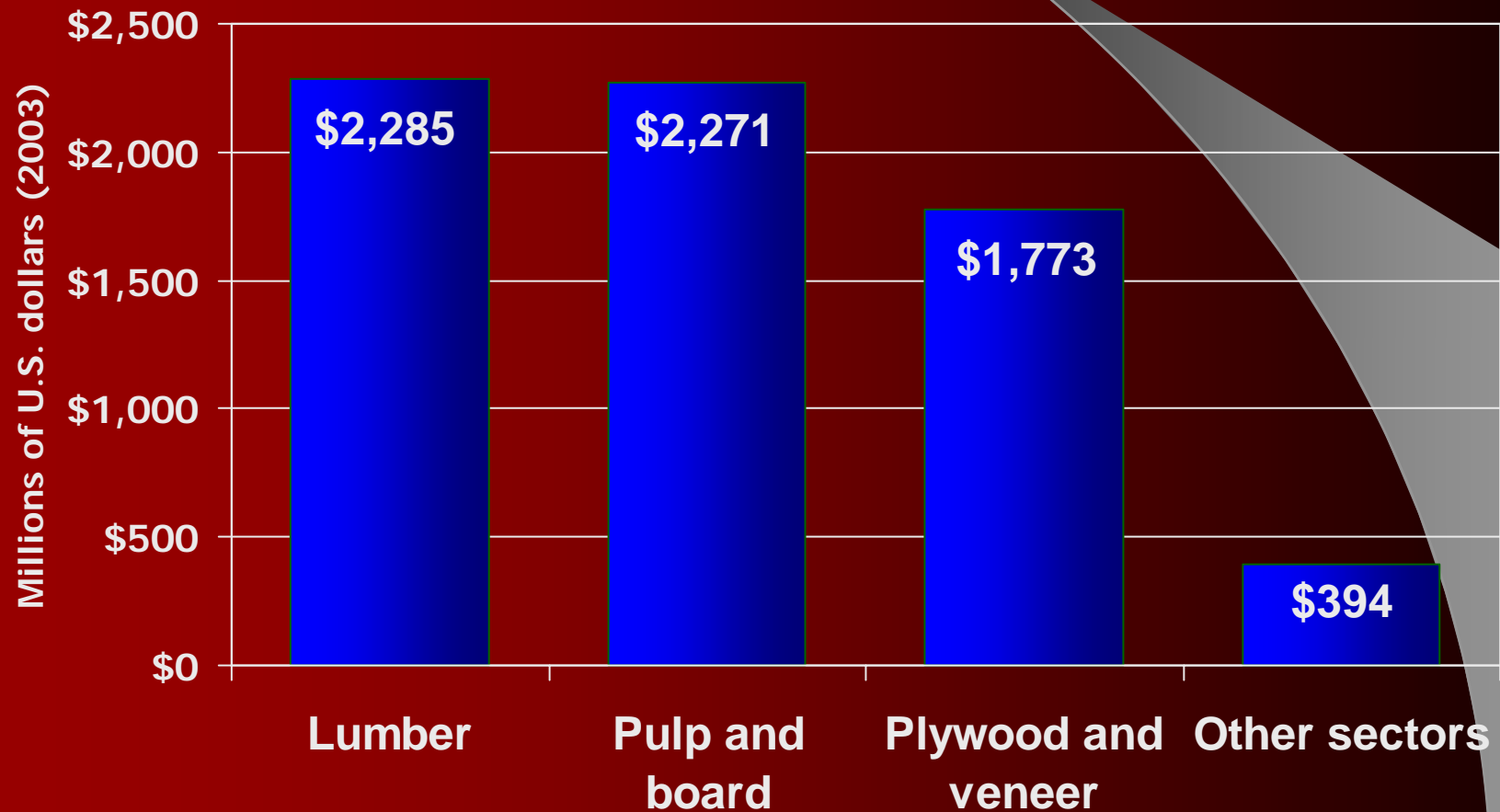
Forest Industry Employment

- **Approximately 65,700 employees**
 - 43,300 (66%) in primary industry
- **Labor income of \$3.3 billion annually**
 - \$2.3 billion in primary industry
- **Above-average wages and benefits**

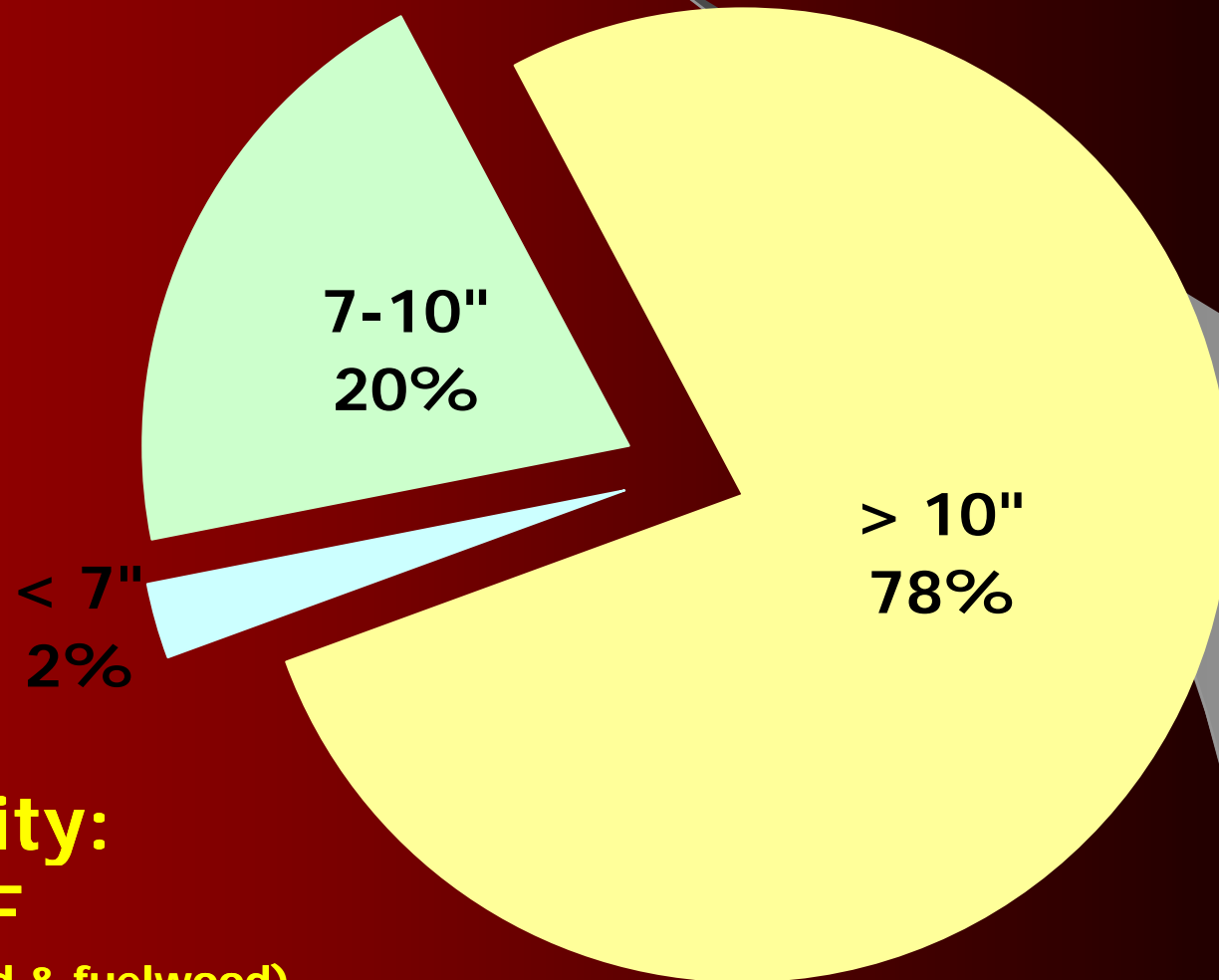
Other Sectors

- **23 pulp and board facilities operating**
 - 12 pulp and paper
 - 11 board
- **25 house log / log home manufacturers**
- **12 post, pole, piling, and utility pole plants**
- **9 chipping facilities**

Oregon's Product Sales Value by Sector, 2003

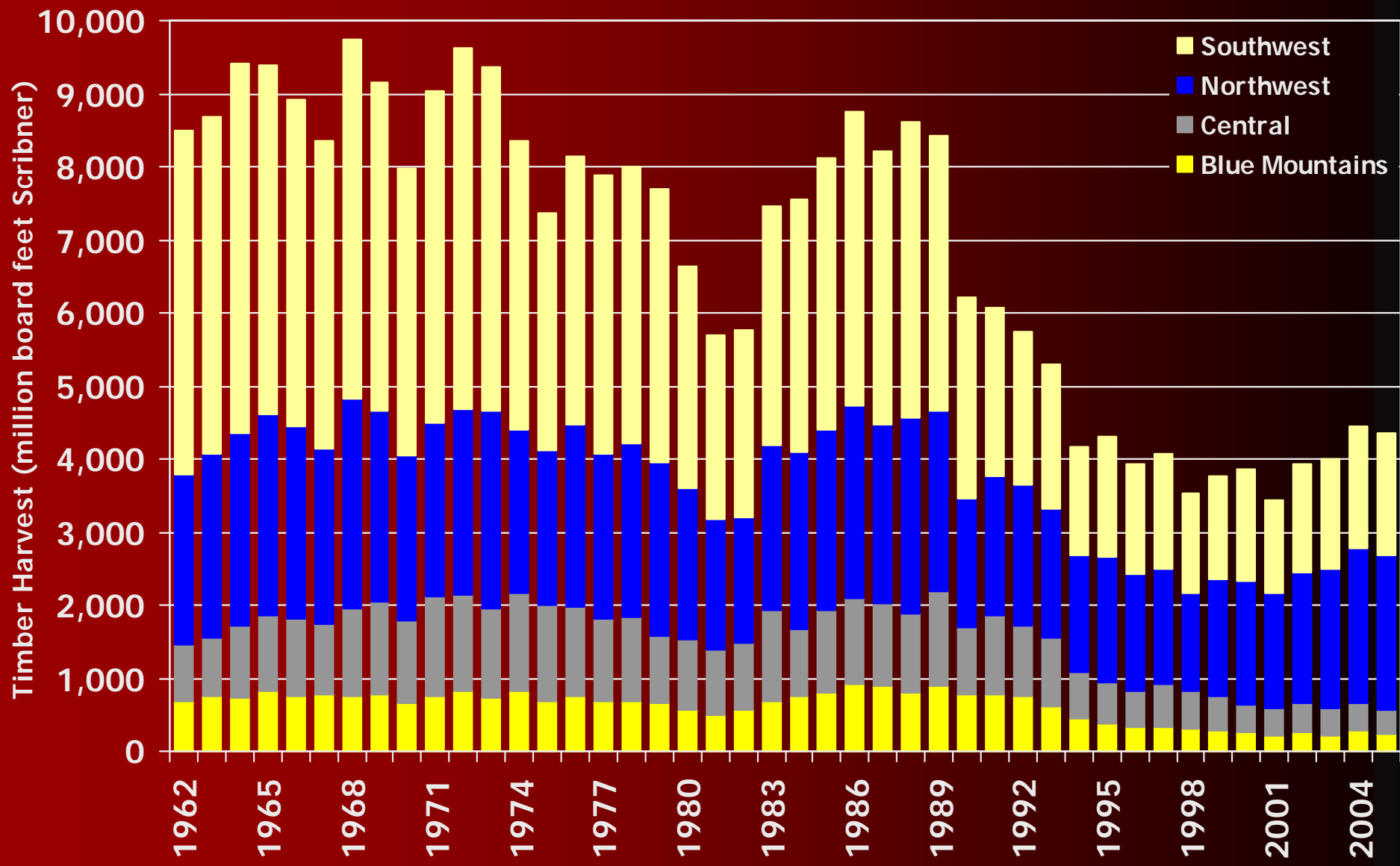


Oregon's Timber-processing Capacity by Tree Size, 2003

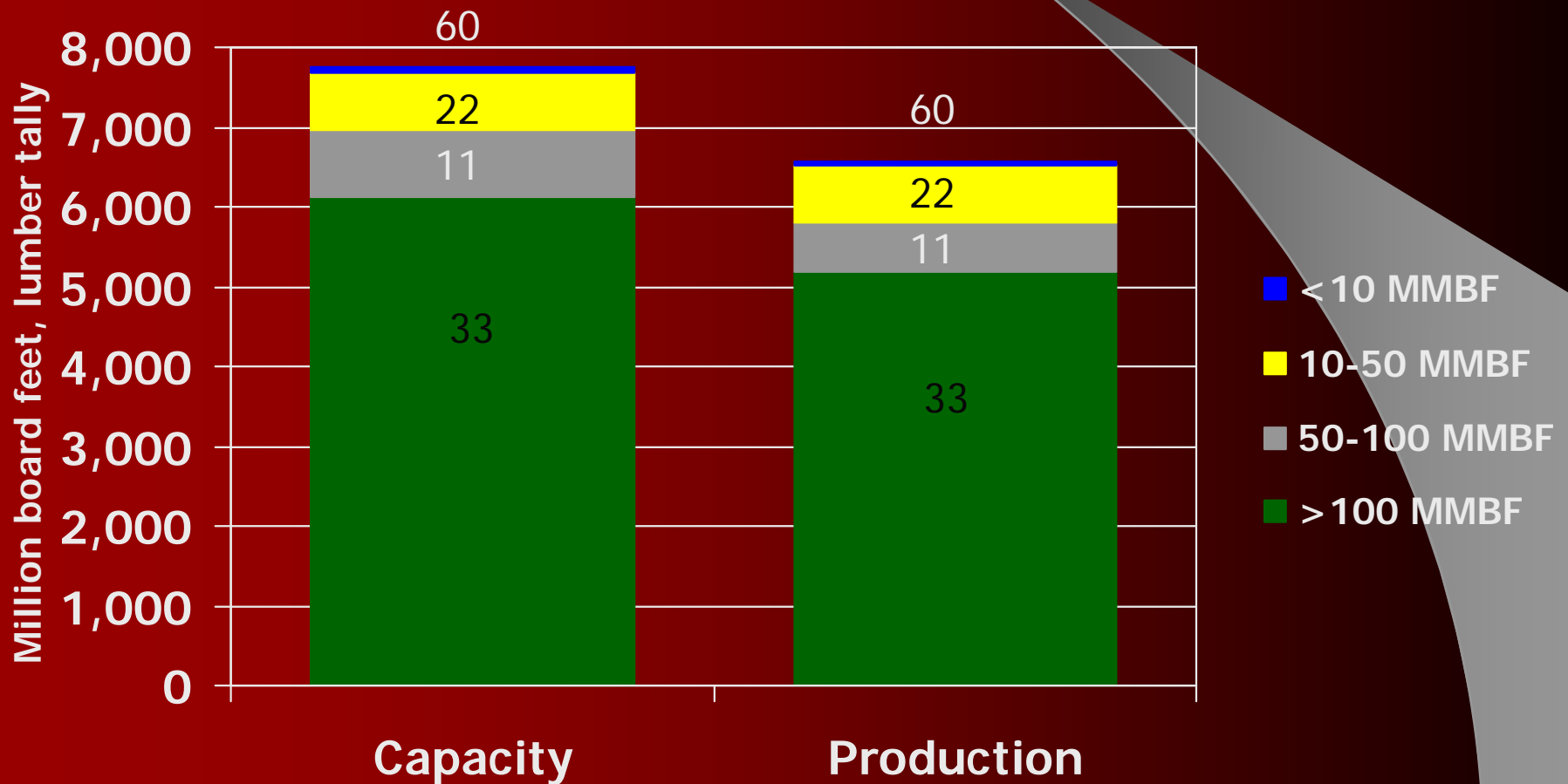


Total capacity:
1,104 MMCF
(excluding pulpwood & fuelwood)

Oregon's Timber Harvest by Resource Area 1962-2005



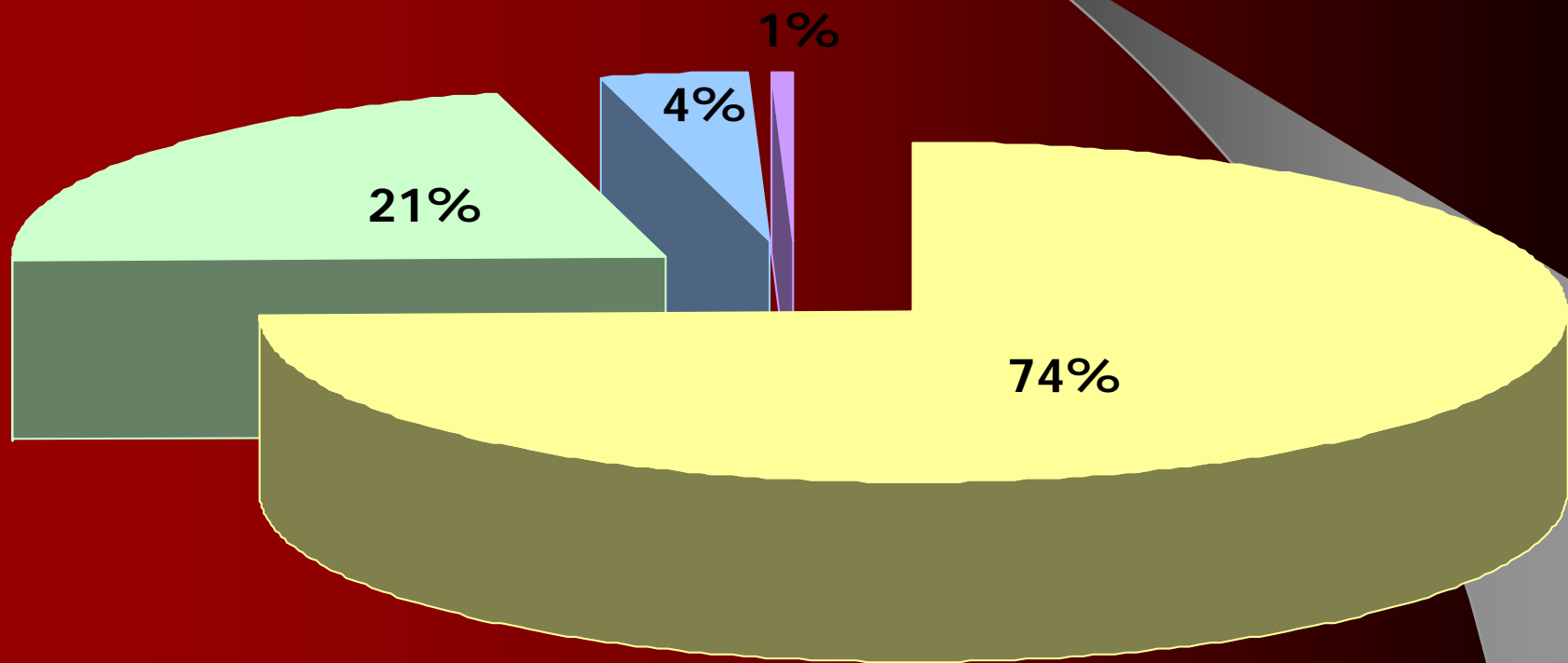
Oregon's Sawmill Production and Capacity by Mill Size Class, 2003



Oregon's Timber Harvest, 2003

- **4,055 MMBF (Scribner) in 2003**
 - Ownership
 - Resource area & county
 - Species
 - Product type

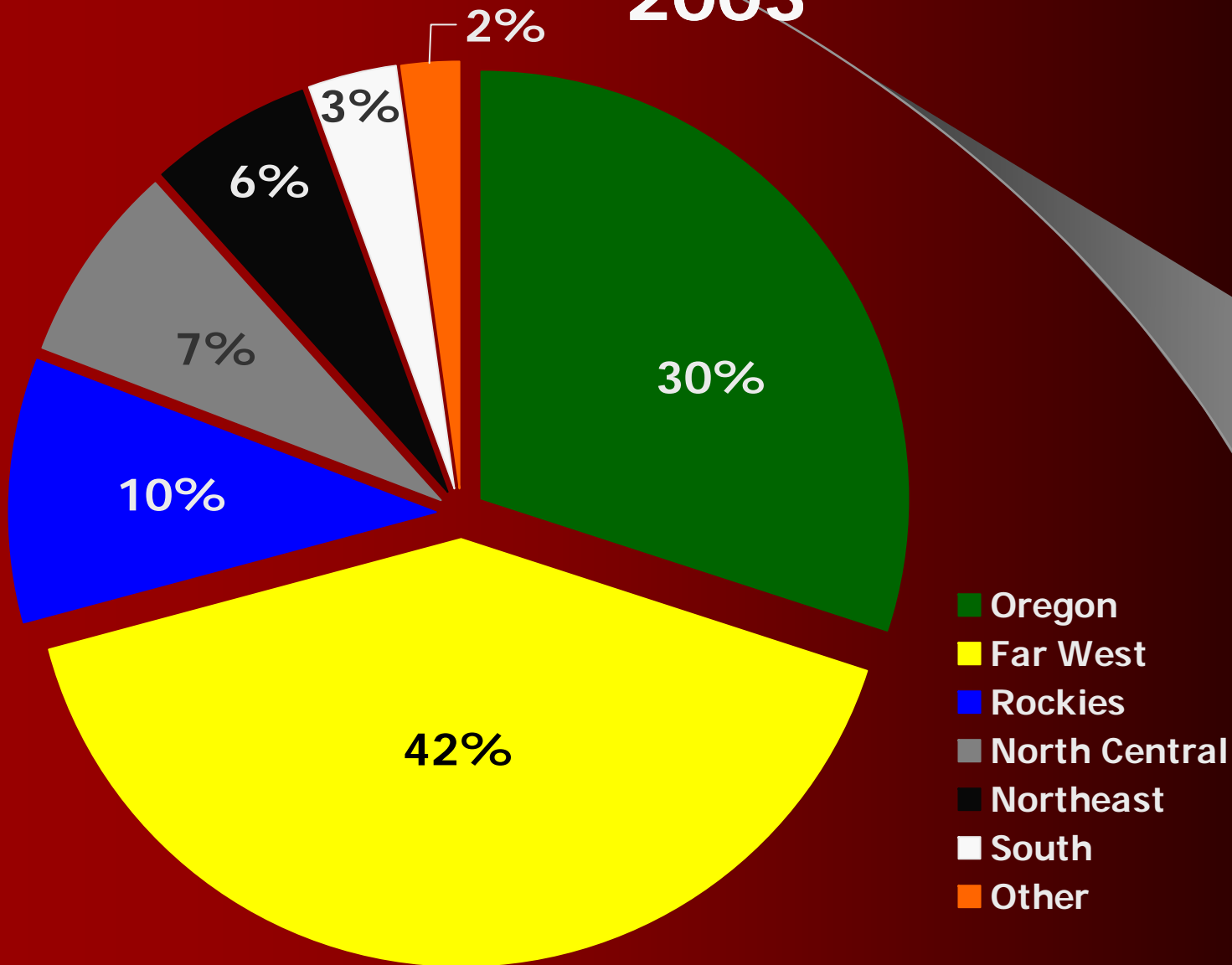
Oregon's Mill Receipts by Product Type, 2003



■ Sawlogs ■ Veneers logs ■ Chipped logs ■ Other timber products

Total = 4,299 MMBF

Destination of Oregon's Primary Wood Products and Mill Residues, 2003



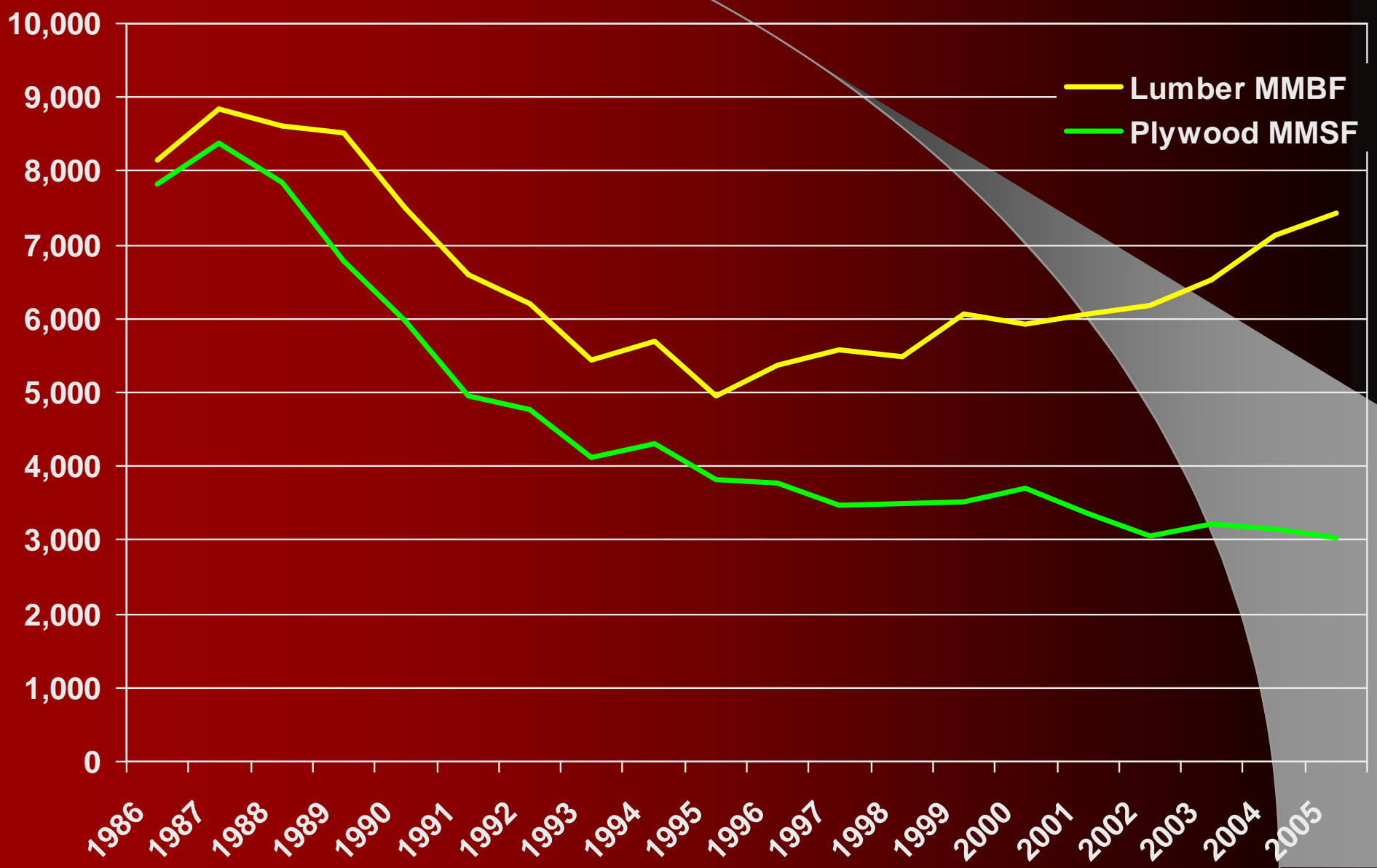
Plywood and Veneer Sector

- **33 plywood facilities operating in 2003**
 - 13 veneer and layup facilities
 - 11 veneer only facilities
 - 9 layup only facilities
- **Softwood plywood production in 2003 was 3,214 MMSF 3/8"**
- **#1 structural panel producing state.**

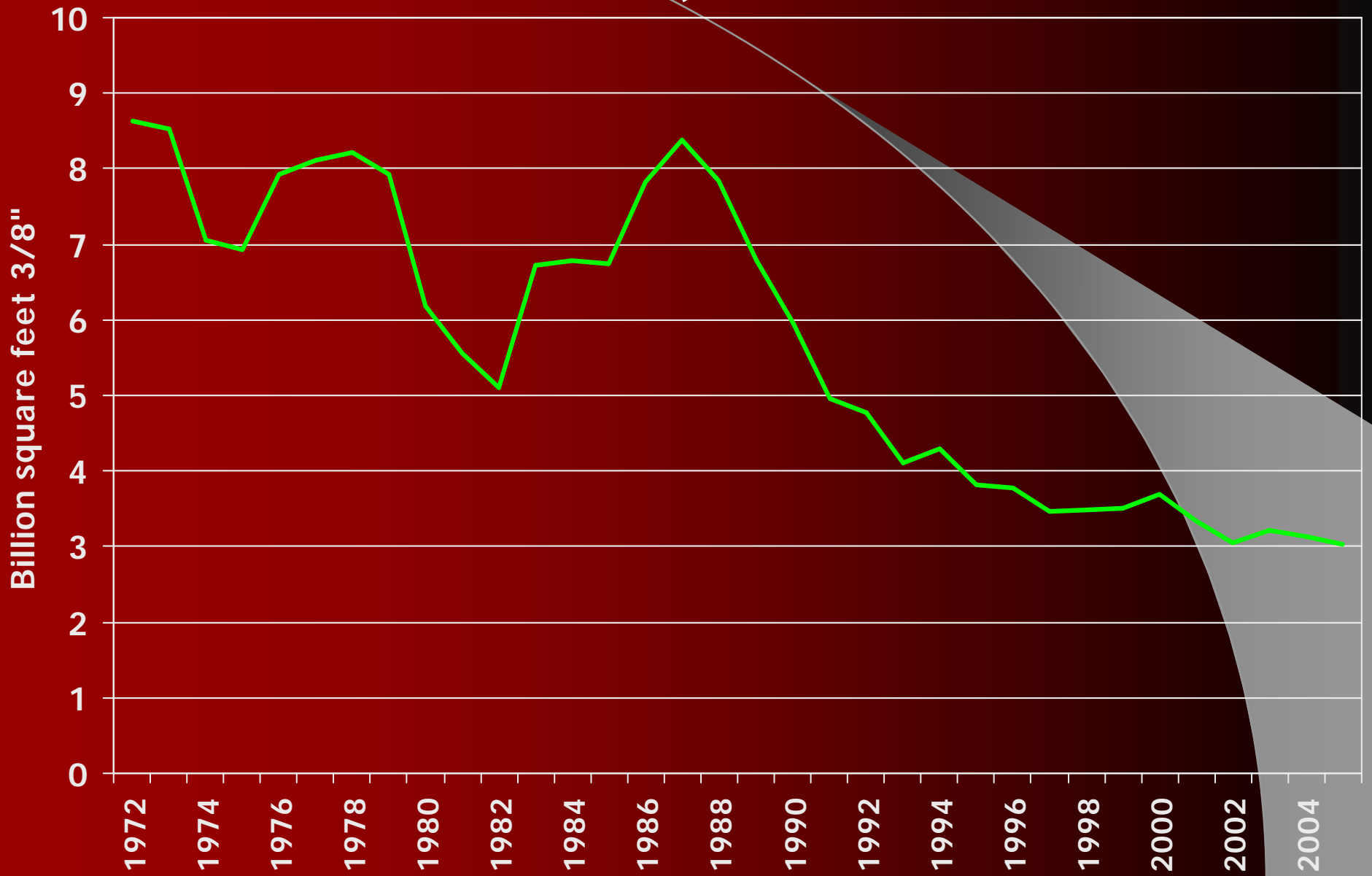
Oregon's Forest Products Industry Sectors

- **249 active primary wood processors in Oregon during 2003.**
 - 126 lumber facilities
 - 33 plywood and veneer plants
 - 25 house log manufacturers
 - 23 pulp and board facilities
 - 30 other facilities of various types including: log furniture, cedar products, bark products, EWP, energy plants, fuel pellets, and export

Oregon's Softwood Plywood and Lumber Production 1986-2004



Oregon's Softwood Plywood Production, 1972-2005



Oregon's Active Primary Forest Products Manufacturers

