Oregon's Forest Products Industry and Timber Harvest, 2013

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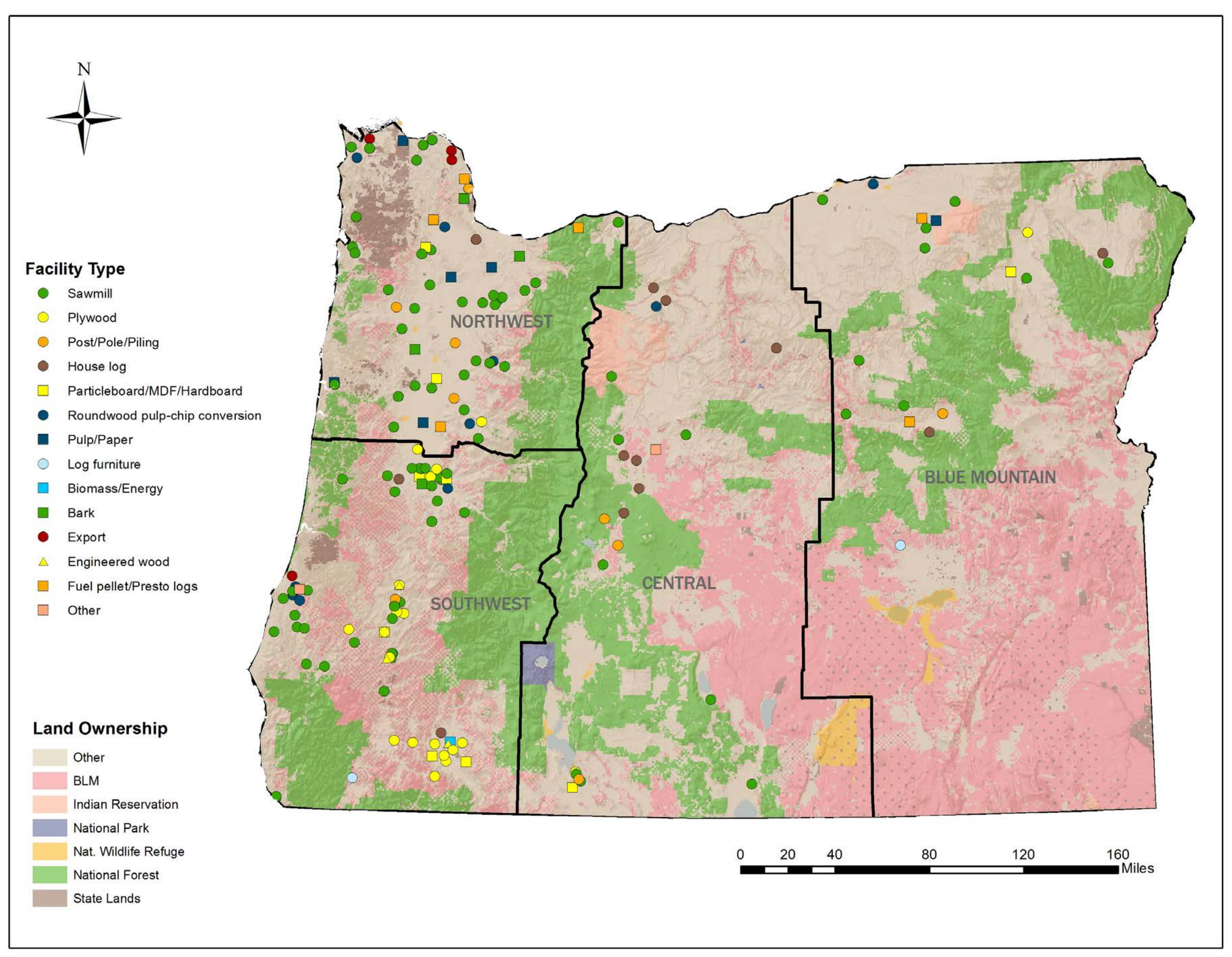
Introduction:

The University of Montana's Bureau of Business and Economic Research (BBER) and the Pacific Northwest-Forest Inventory and Analysis (FIA) Program have developed the Forest Industries Data Collection System (FIDACS) to collect, compile, and make available state and county-level information on the operations of the forest products industry. The FIDACS is based on a census of primary forest product manufacturers located in a given state. Through a written questionnaire or phone interview, the following information is collected for each active facility in a given calendar year:

- Plant production, capacity, and employment
- Volume of raw material received, by county and ownership
- Species of timber received and live/dead proportions
- Finished product volumes, types, sales value, and market locations
- Utilization and marketing of manufacturing residue

Oregon's Primary Timber Processing Facilities and Land Ownership, 2013



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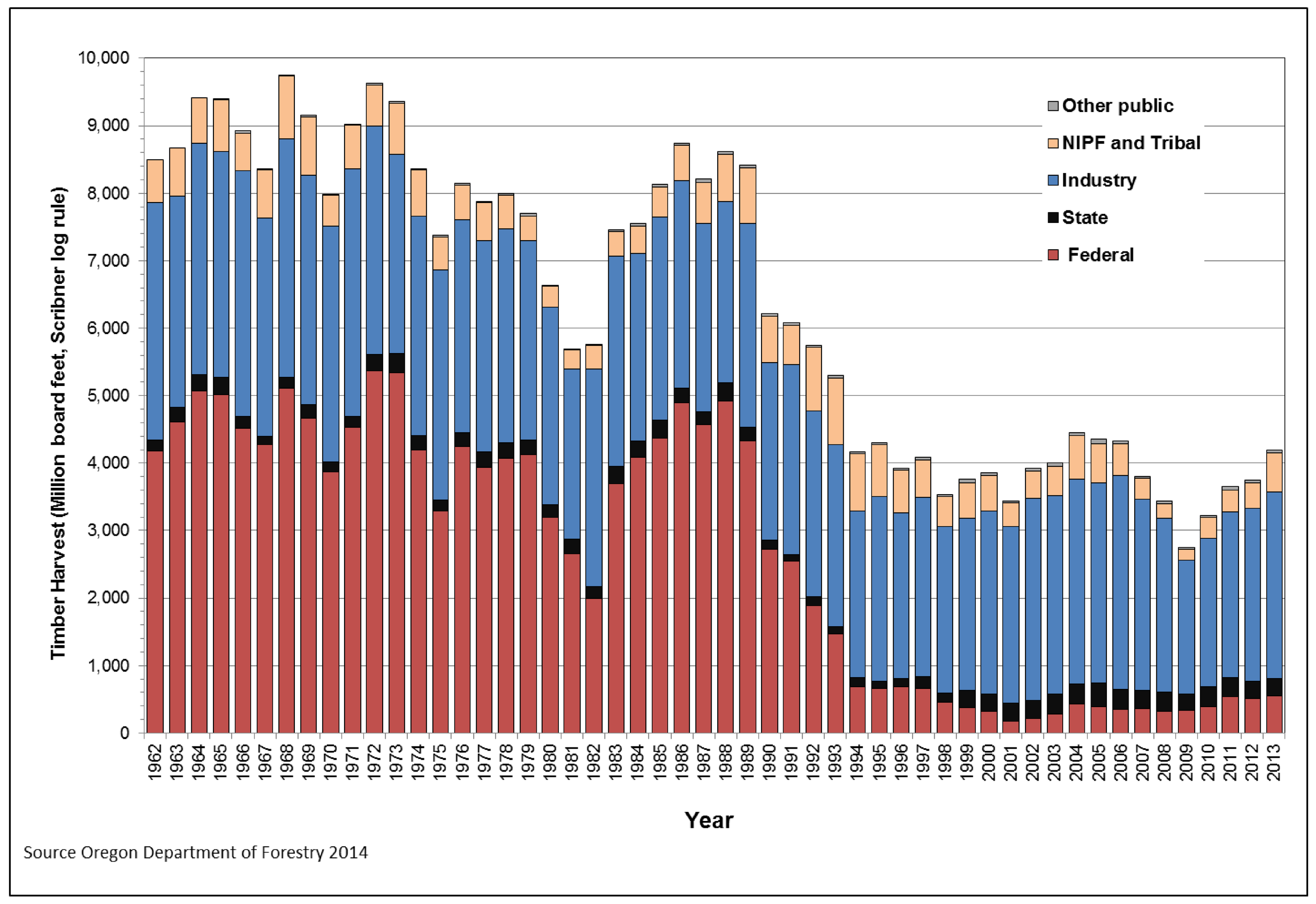
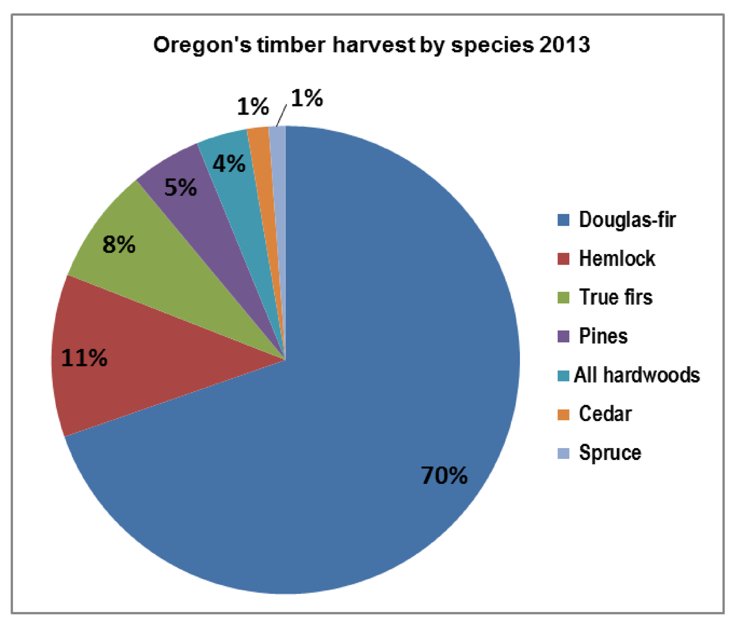
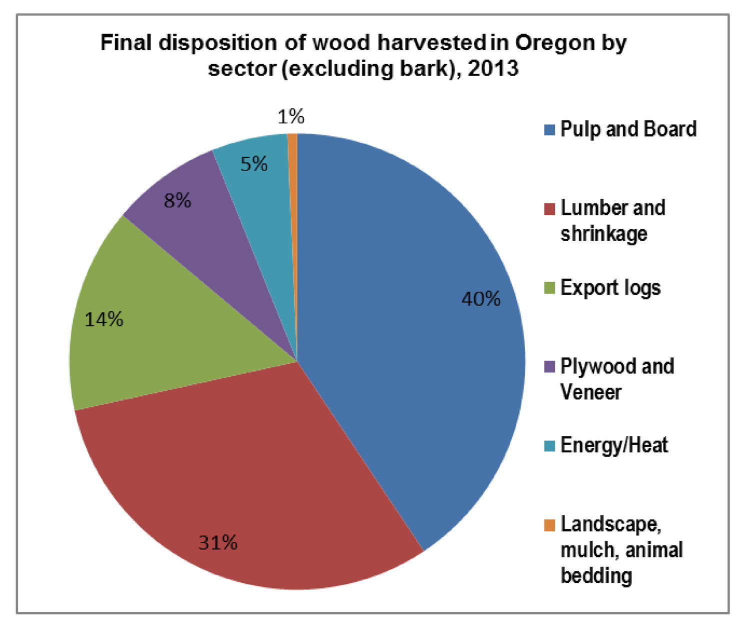
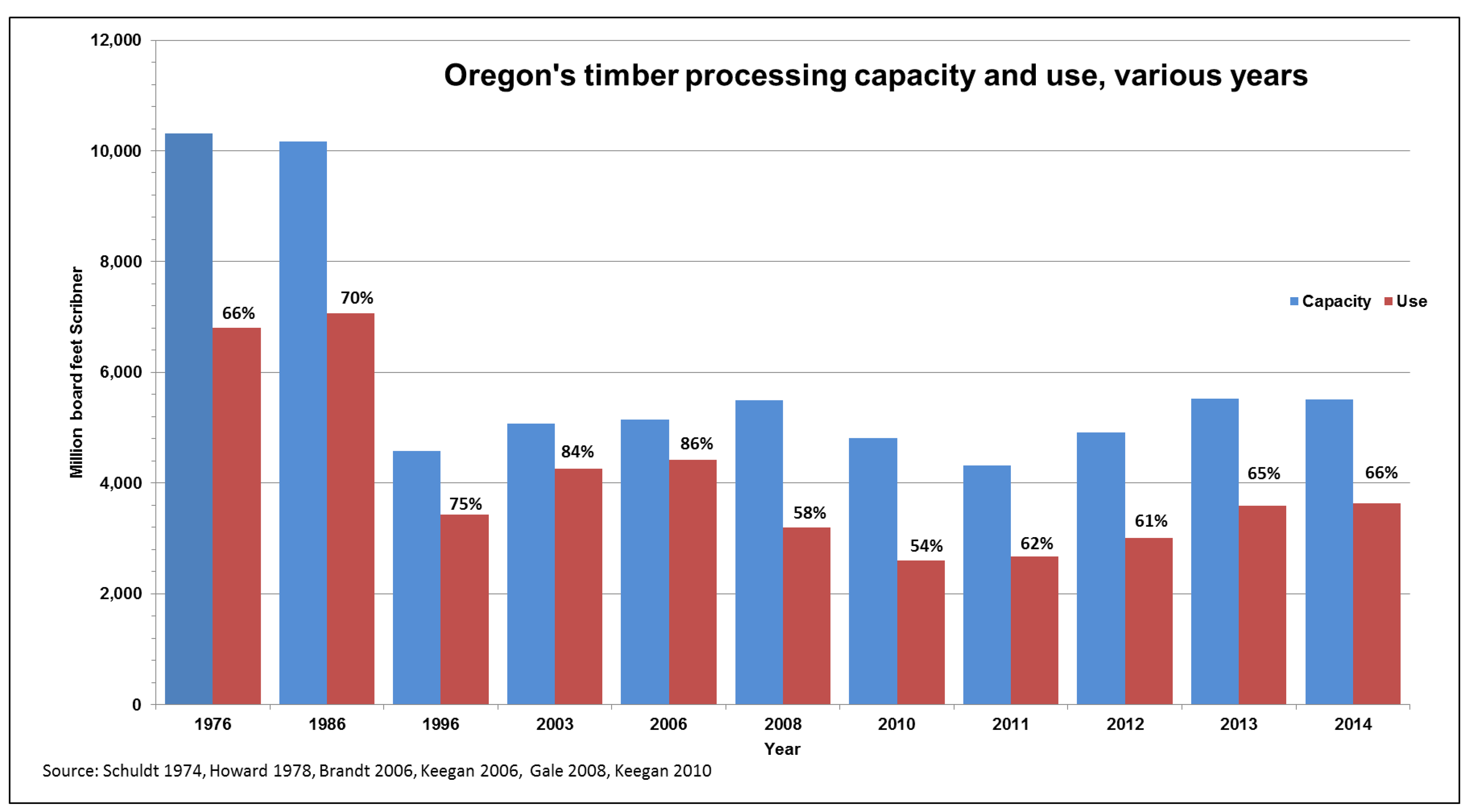
NARA
Northwest Advanced Renewables Alliance

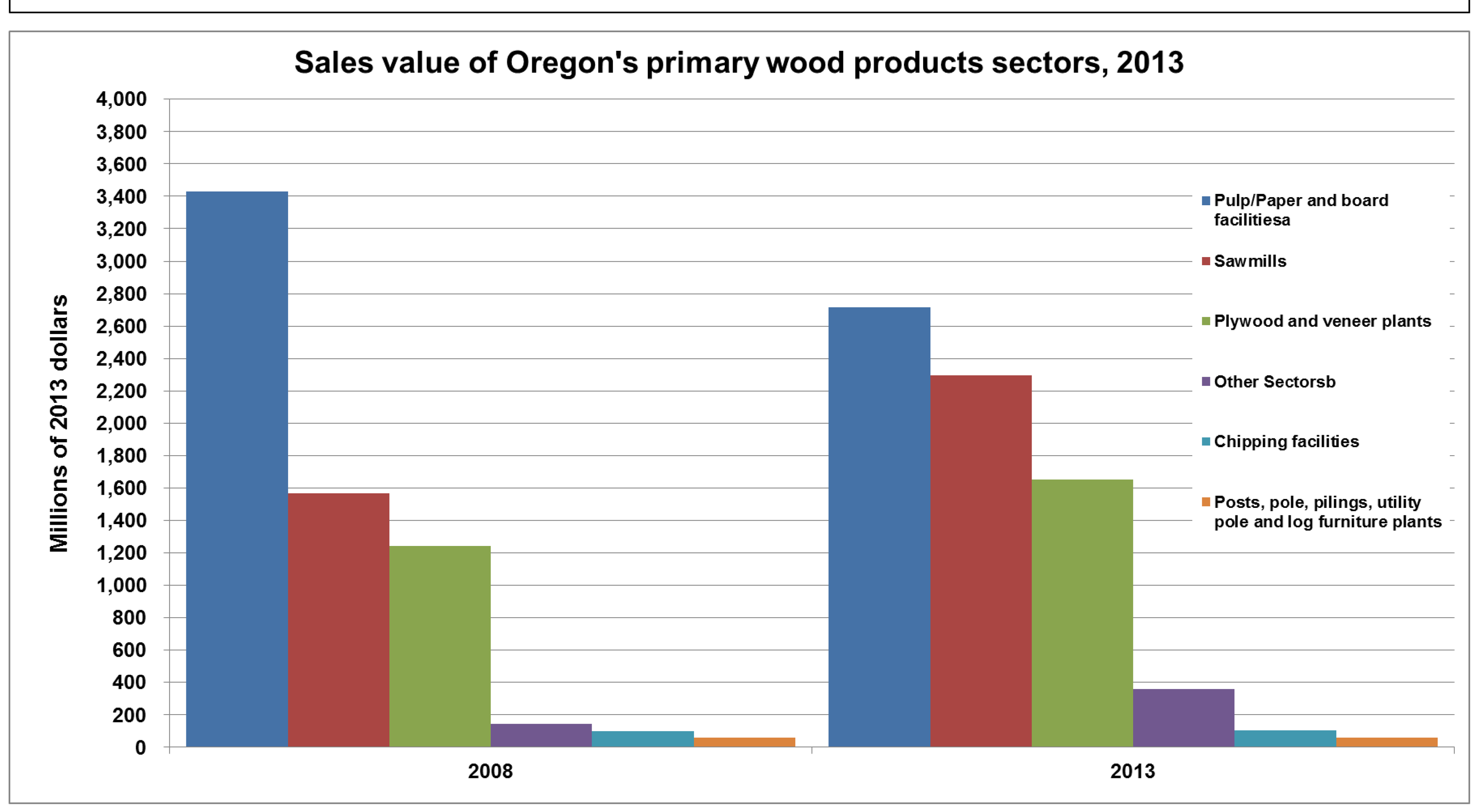
Oregon's timber harvest by ownership class, 1962-2013











Results and Highlights:

A total of 188 primary forest products facilities operated in Oregon during 2013 compared to 251 in 2008. These included:

- 88 softwood and hardwood sawmills and 2 cedar sawmills.
- 26 plywood/veneer facilities
- 19 pulp/paper and board plants
- 15 log home and log furniture producers
- 11 roundwood chipping facilities
- 9 post, pole, piling and utility pole plants
- 14 other facilities including biomass, wood pellet, charcoal briquette, artisan wood products, landscape bark/mulch, and animal bedding producers.
- 4 export log concentrating or exporting yards

Oregon's timber harvest was 4.2 billion board feet (BBF) Scribner in 2013, representing a 17.4 percent increase compared to 2008. Almost 90 percent (3.8 BBF Scribner) of the timber harvest came from counties west of the Cascades. Eighty percent of Oregon's 2013 timber harvest came from private lands, 12 percent from Federal lands, nearly 7 percent from Oregon Department of Forestry (ODF) lands and the remaining harvest came from other public sources.

Approximately 84 percent of the timber harvested in Oregon was processed in-state with nearly 16 percent (662 million board feet (MMBF)) exported to countries in the Pacific Rim.

Sawmills received 2.6 BBF (70 percent) of the timber processed in Oregon during 2013. Plywood/veneer plants received 713 MMBF. These two sectors combined accounted for nearly 90 percent of Oregon's 2013 timber receipts. Nine percent of the receipts were chipped, primarily for pulp/paper and board products, and the remaining timber was used for other products.

The capacity of Oregon's sawmills to process timber rose slightly from 3.9 BBF Scribner in 2008 to 4.2 BBF in 2013, despite the permanent closure of several facilities since 2008. Sawmill capacity utilization increased from 62 percent in 2008 to 66 percent in 2013.

Oregon sawmills produced an average of 2.12 board feet lumber tally for every board foot Scribner of log input. These mills produced 5.2 billion board feet of lumber in 2013 with a sales value of nearly $2.3 billion compared to 4.7 BBF of lumber with a sales value of $1.5 billion in 2008.

Sales values in 2013 for primary wood products (including export logs) were $7.2 billion, an 11 percent increase from $6.5 billion in 2008 (all sales values comparisons to 2008 are in 2013 dollars).

Sales of pulp/paper and board were still the largest portion of total sales (including mill residuals) at 37 percent, a decline from 51 percent of sales value in 2008. Lumber sales were 31 percent of the total in 2013 compared to 23 percent in 2008.

Sales values from the "other products" sector increased from 3 percent of total sales in 2008 to nearly 5 percent in 2013. This increase was primarily due to increased international log exports.

Oregon's primary facilities produced over 6.5 million bone-dry tons of residue in 2013, with less than 1 percent unutilized. Pulp/paper and board plants received 60 percent of all mill residuals. Most of the remaining residuals were used as fuel.

Approximately 43,300 workers were employed in Oregon's forest industry during 2013, an 8 percent increase from the 2011 low of 40,138. Total workers earnings have rebounded as well, from $2.7 billion in 2011 to $3.2 billion in 2013.

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