

Idaho's Forest Products Industry and Timber Harvest, 2011

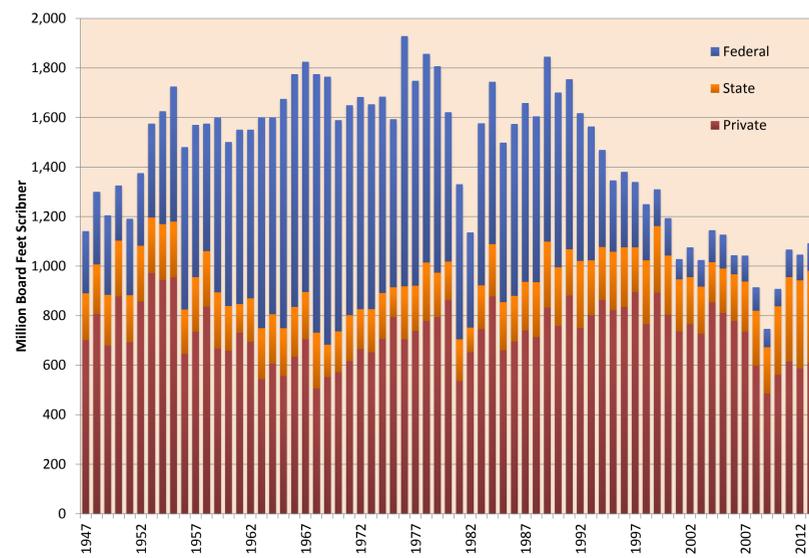
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Introduction:

The University of Montana's Bureau of Business and Economic Research (BBER) and the Interior West-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

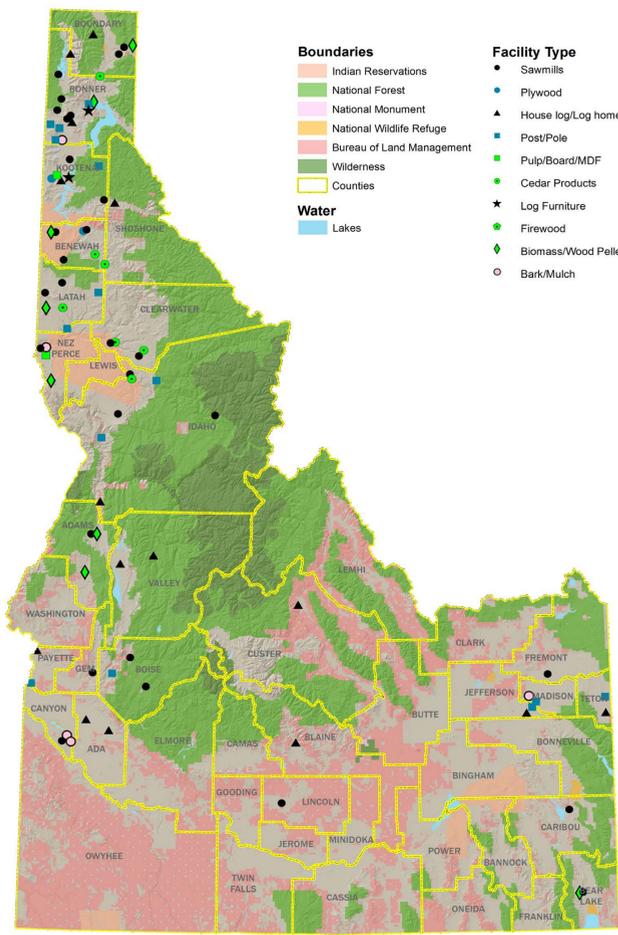
Idaho's timber harvest by ownership class, 1947-2013



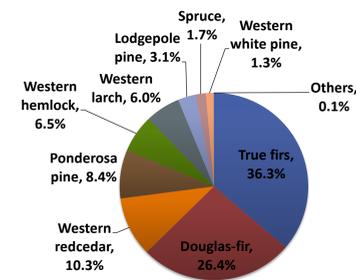
Results and Highlights:

- A total of 88 primary forest products facilities operated in Idaho during 2011:
 - 27 sawmills
 - 2 plywood/veneer plants
 - 16 log home facilities
 - 18 residue related products facilities
 - 8 cedar product manufacturers
 - 17 post, pole, and log furniture producers
- Idaho's total timber harvest in 2011 was 1.07 billion board feet Scribner, more than 40 percent higher than the 2009 record low harvest, and approximately 5 percent lower than the pre-recession timber harvest volumes of 2006 and 2007.
- Timber harvest from non-industrial private timberlands fell from 31 percent of the total harvest in 2006 to just 12 percent in 2011. Public lands contributed 42 percent of the harvest in 2011 compared to 26 percent in 2006. State lands accounted for more than 30 percent of the 2011 harvest and National Forests accounted for almost 10 percent.
- Saw and veneer logs comprised over 88 percent of the total harvest. Clearwater, Benewah, Shoshone, and Latah counties were the largest contributors to the state's total harvest in 2011, accounting for 60 percent of the total harvest volume.
- Idaho sawmills recovered an average of 1.67 board feet lumber tally per board foot Scribner of input, representing the first decline in sawmill overrun in 40 years. Idaho's 27 active sawmills produced 1.35 billion board feet of lumber during 2011.
- Idaho sawmills with a production capacity of over 50 million board feet (MMBF) lumber tally annually accounted for 86 percent of Idaho's lumber production in 2011 compared to 94 percent in 2006 and just 39 percent in 1995.
- Idaho's primary forest products industry shipped products valued at \$1.4 billion (FOB the producing mill) in 2011. Lumber and plywood/veneer contributed 36 percent of total sales while residue related products such as pulp and paper, particleboard, and other products represented 56 percent.
- Sawmills, along with plywood and veneer facilities, generated over 1.14 million bone-dry units (BDU) of wood residue during 2011 of which more than 99 percent was utilized.
- Idaho's log home industry was severely impacted by the Great Recession, U.S. housing bust of 2007-2009, and slow economic recovery since then. Log home sales during 2011 were down about 80 percent from 2006 levels, and timber use by Idaho's log home sector was down nearly 90 percent.

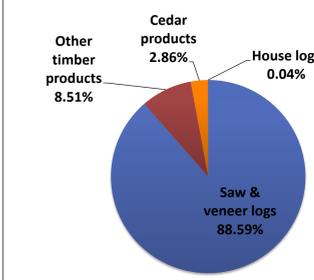
Idaho Primary Wood Processing Facilities, 2011



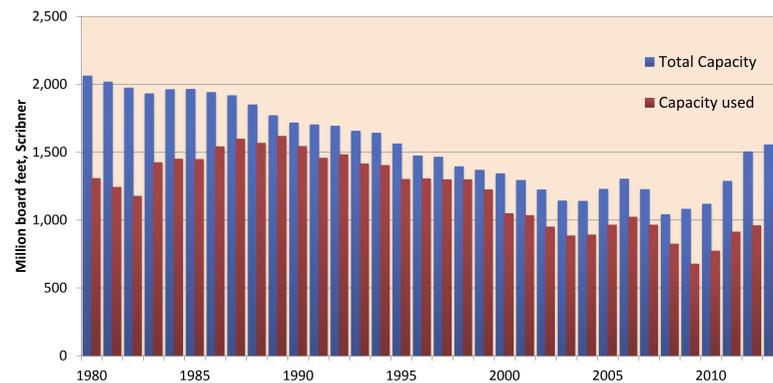
Idaho's timber harvest by species, 2011



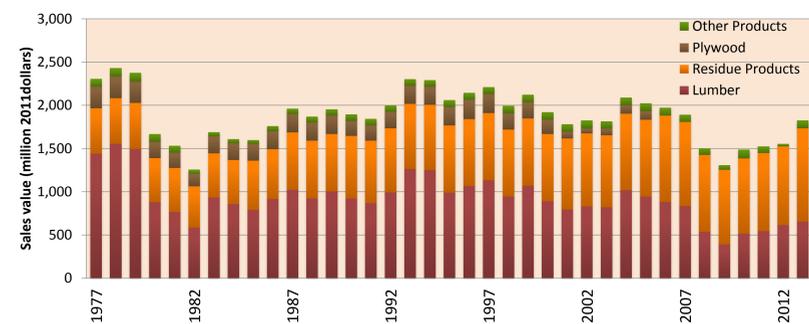
Idaho's timber harvest by product type, 2011



Idaho's capacity for processing sawtimber, 1980-2013



Sales value of Idaho's primary forest products, 1977-2013



Funding provided by:
 USDA, Forest Service,
 Interior West Forest Inventory and
 Analysis (FIA) Program,
 Ogden, Utah.



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