

The Four Corners Timber Harvest and Forest Products Industry, 2012

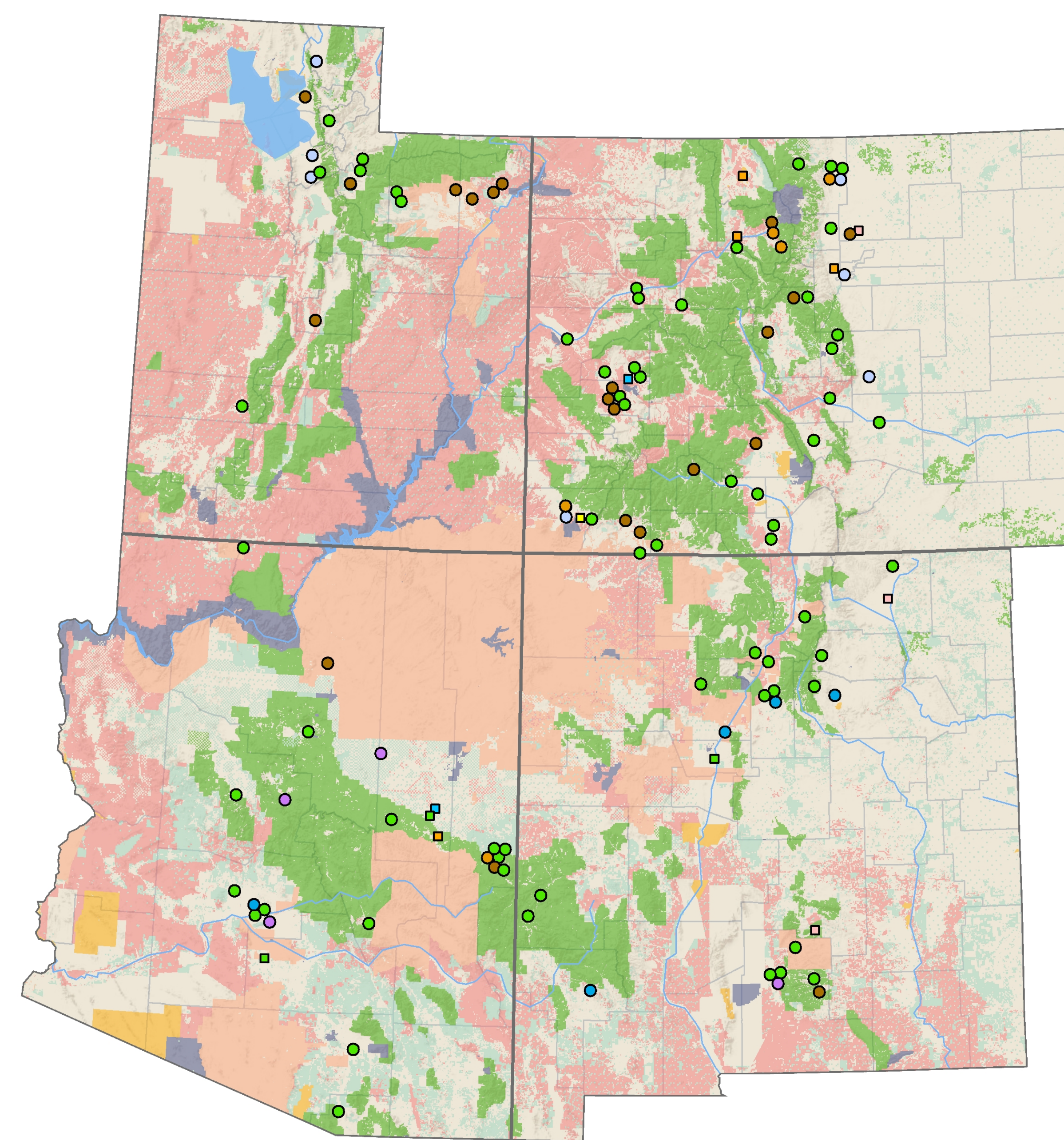
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Introduction:

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:

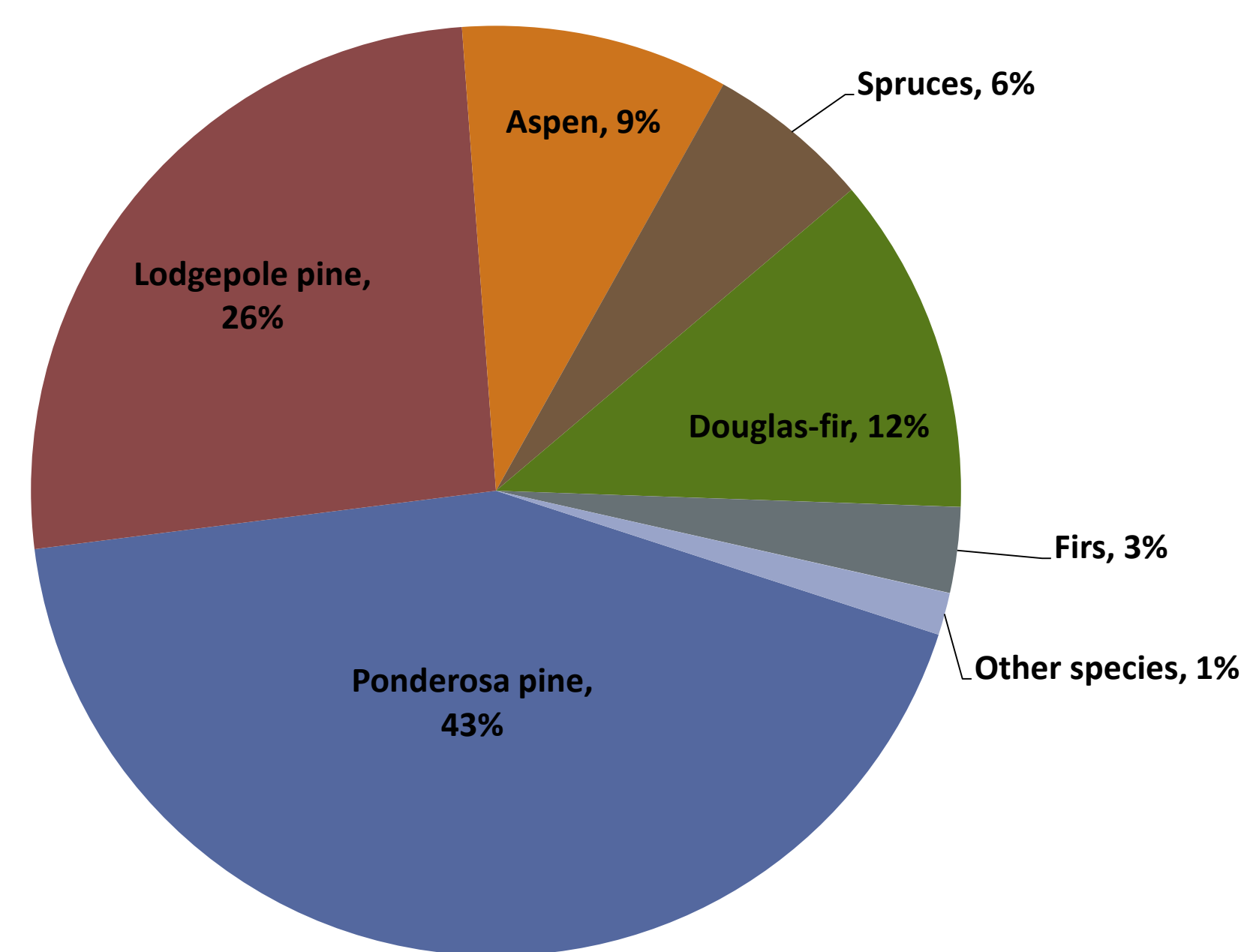
- Plant production, capacity, and employment
- Volume of raw material received, by county and ownership
- Species of timber received and live/dead proportions
- Finished product volumes, types, sales value, and market locations
- Utilization and marketing of manufacturing residue

Four Corners Active Facilities, 2012

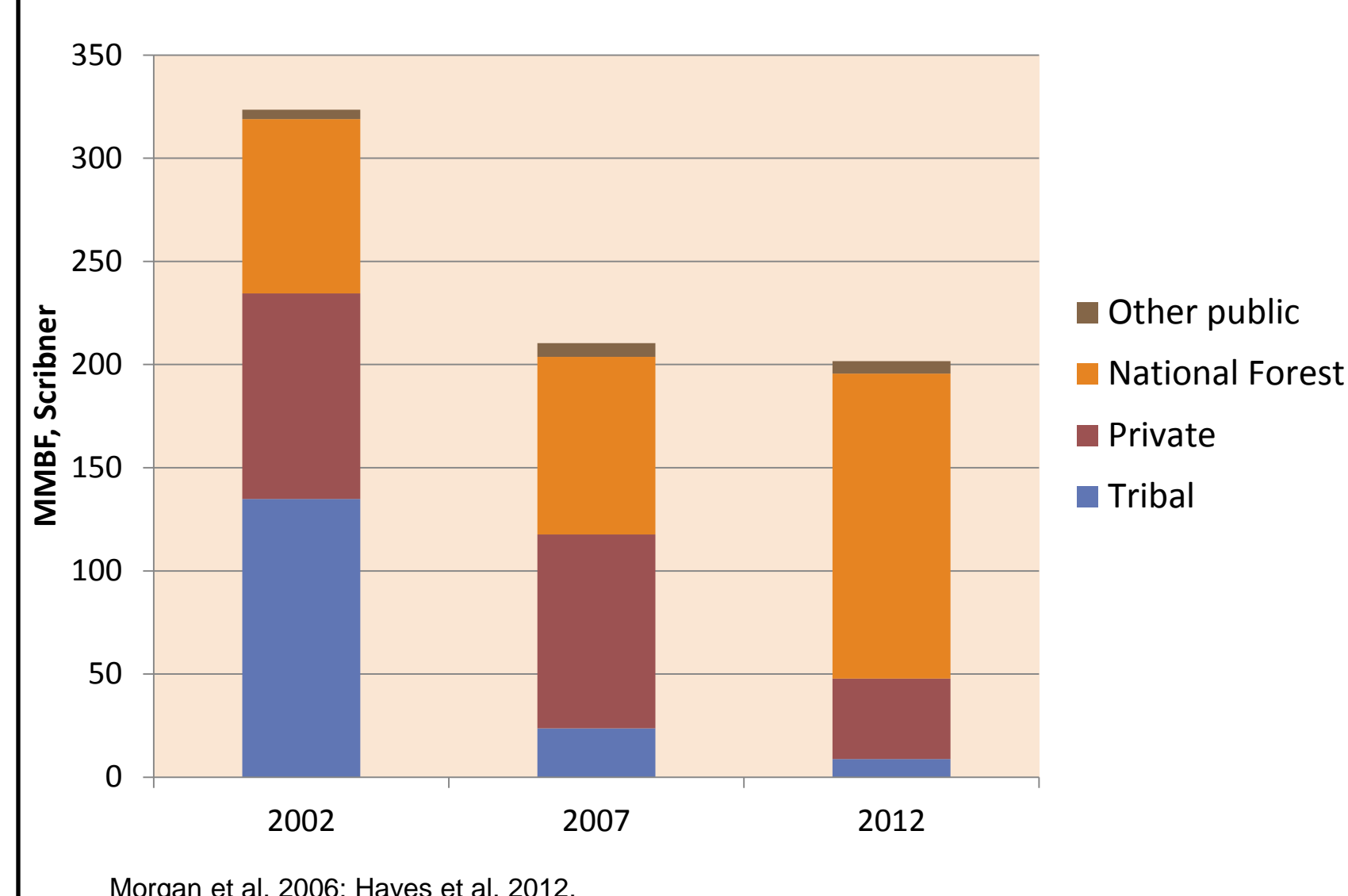


- | | |
|---------------------------|----------------------------|
| Mill Types | Selected Ownerships |
| ● Sawmill | ● Tribal |
| ● Veneer | ● NPS |
| ● Post/pole | ● State |
| ● House log | ● BLM |
| ● Firewood | ● USFS |
| ● Log furniture | ● USFWS |
| ● Vigas/Latillas | |
| ● Biomass | |
| ● Bark Products | |
| ● Fuel Pellet/Presto Logs | |
| ● Excelsior | |
| ● Shavings | |

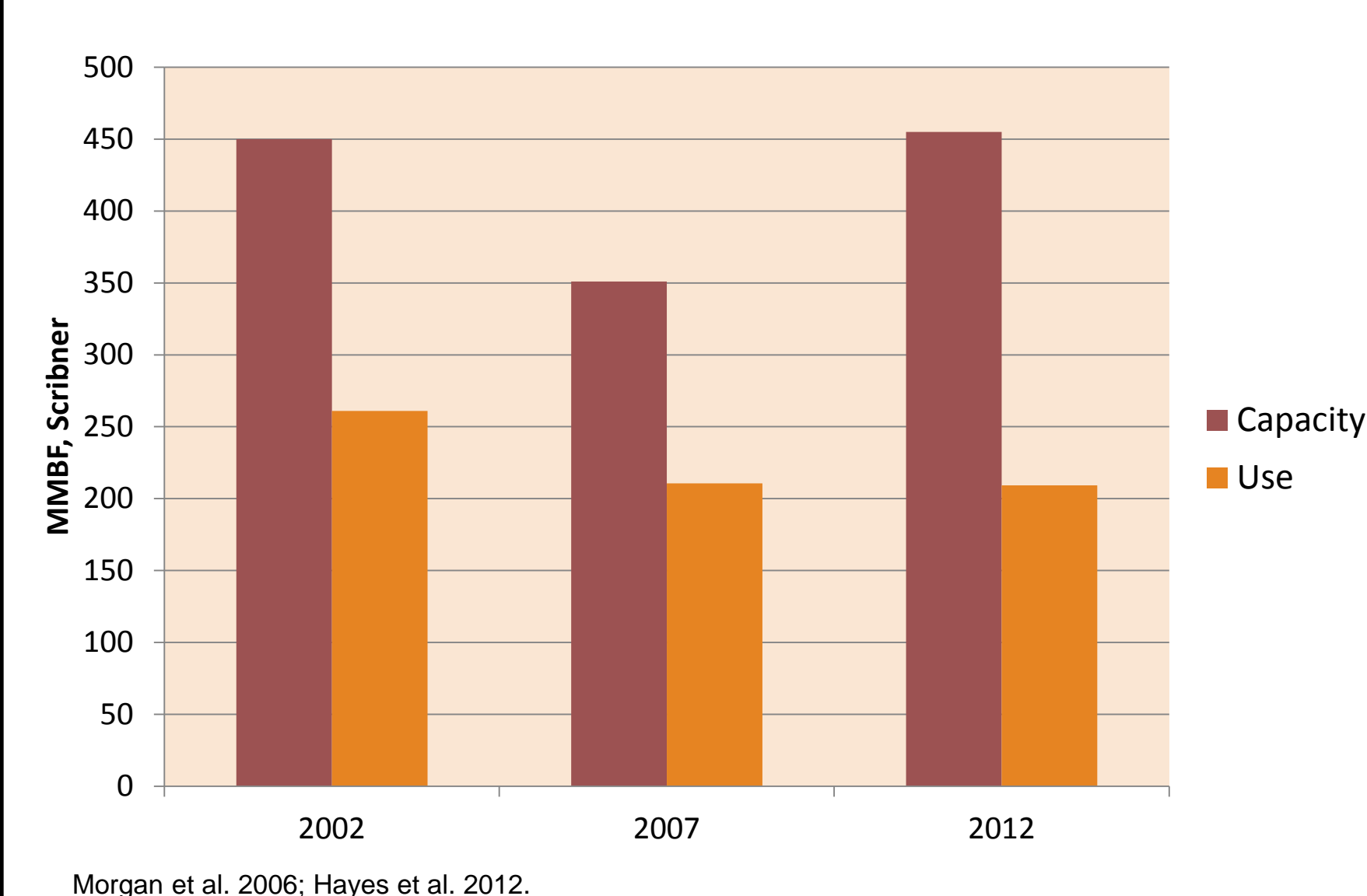
Four Corners Timber Harvest by Species, 2012



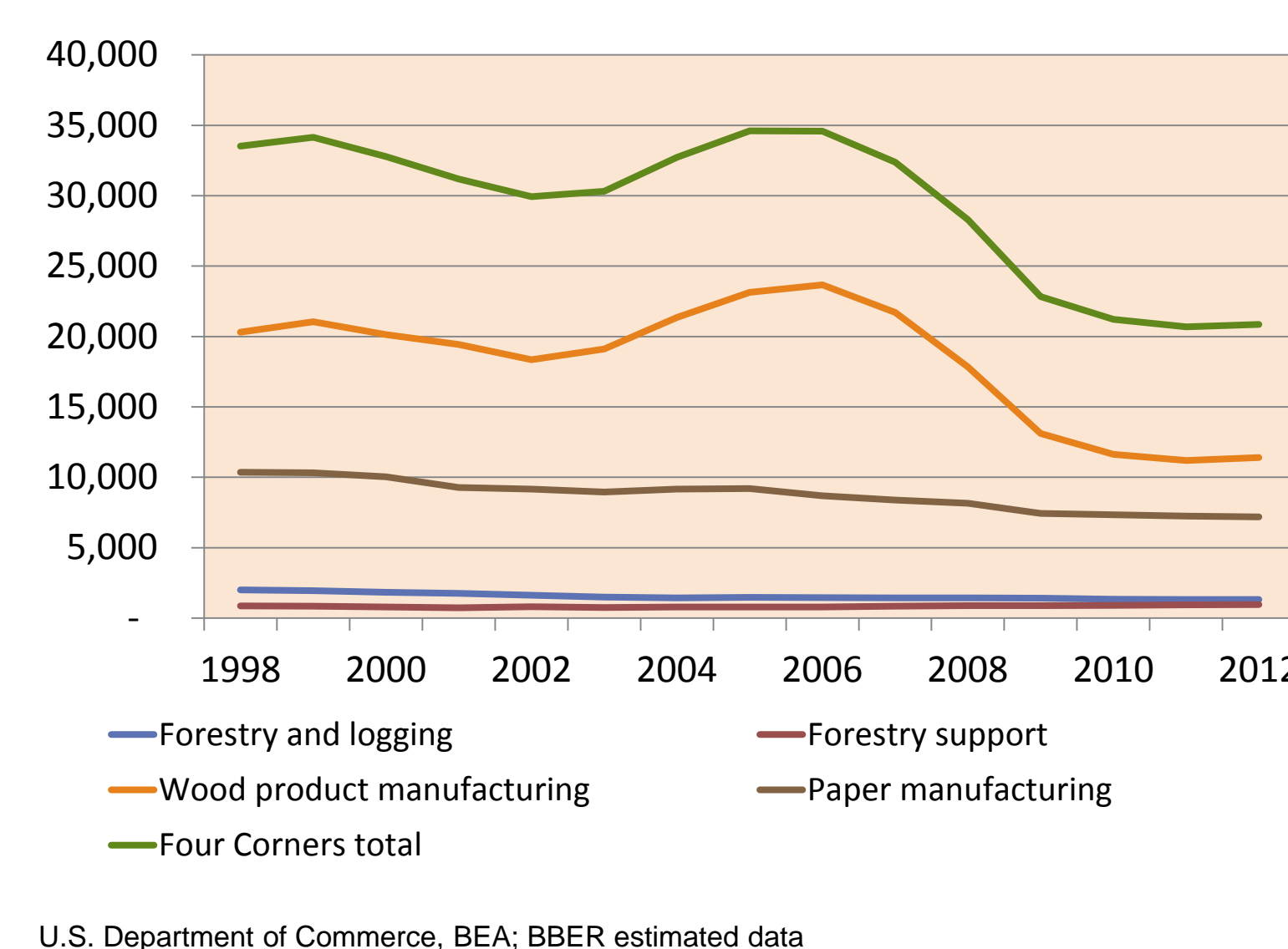
Four Corners Timber Harvest by Ownership, 2012



Four Corners timber processing capacity and use, 2002-2012



Four Corners forest industry employment, 1998-2012



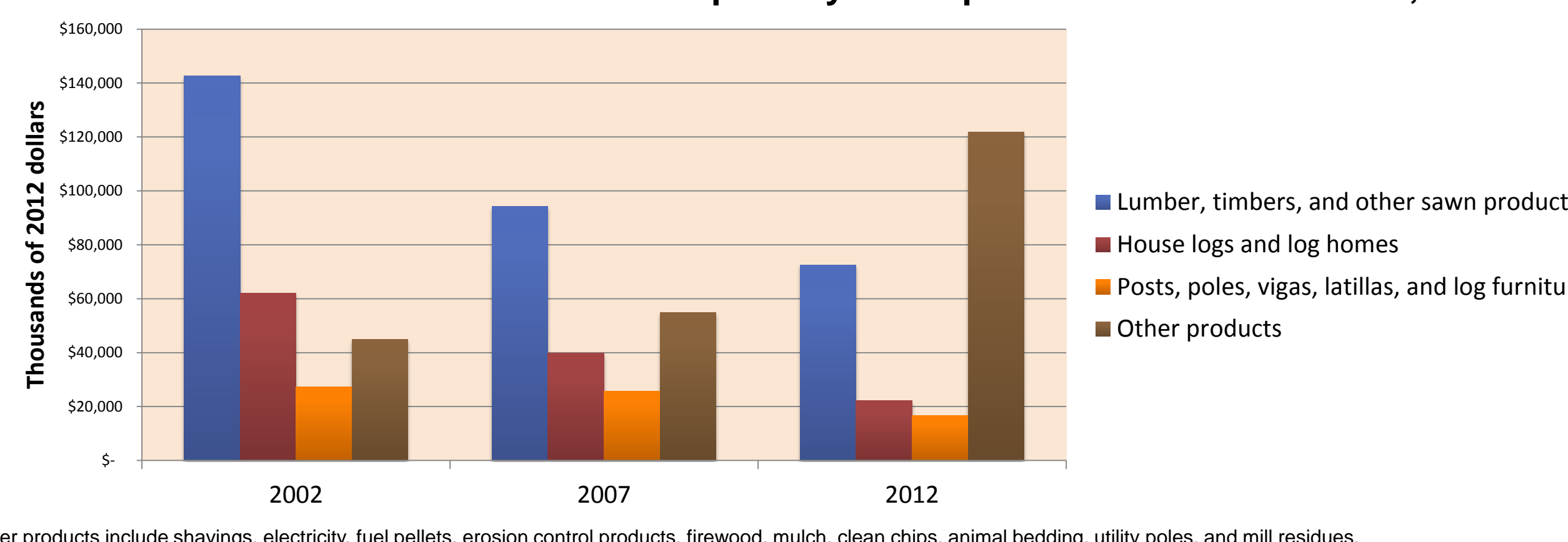
Results and Highlights:

- During calendar year 2012, 201.7 million board feet (MMBF) of timber was harvested from Arizona, Colorado, New Mexico, and Utah. Most (73.3 percent) of the harvested volume came from National Forests, while 23.7 percent came from tribal and non-industrial private timberlands. Ponderosa pine was the leading species harvested, accounting for 43 percent of the total. Lodgepole pine accounted for 25.8 percent, followed by Douglas-fir and Aspen at 9.3 percent, respectively.
- During 2012, there was a net out-flow of timber from the Four Corners to mills in other states. Mills in the Four Corners received 0.4 MMBF of timber from outside the region, while 8.9 MMBF went to mills outside the region.
- Timber-processing capacity (i.e., the volume of timber that could be used by existing timber processors if demand for products were firm and sufficient raw material were available) in the Four Corners during 2012 was approximately 455 MMBF, Scribner, representing a 30% increase from the 2007 capacity. The increase in processing capacity in the region is primarily due to new or reconfigured mills designed to generate electricity or produce energy products like fuel pellets.
- This report identified 135 primary timber-processing facilities active during 2012 in the Four Corners. These facilities included 73 sawmills, 23 log home or house log manufacturers, 9 post and pole facilities, 6 log furniture producers, 6 viga and latilla producers, and 18 other facilities.
- During 2012, production of lumber and other sawn products exceeded 185 MMBF lumber tally. Lumber production in Arizona was 50 MMBF, Colorado was 98 MMBF, New Mexico was about 25 MMBF, and Utah's lumber production was 12 MMBF.
- Four Corners timber processors produced 232,366 bone dry units (BDU) of residue during 2012, of which just 6,419 BDU (3 percent) went unused. Sawmills generated 191,796 BDU—80 percent of all mill residue in the region.
- The Four Corners primary wood product sales value (f.o.b. the producing mill), including mill residues, totaled \$233 million during 2012. Nearly \$156 million (65 percent) of sales were within the Four Corners States. Lumber and other sawn products sales totaled \$73 million or 31 percent of sales.

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Sales value of Four Corners primary wood products and mill residue, 2012



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