

California's Forest Products Industry and Timber Harvest, 2012

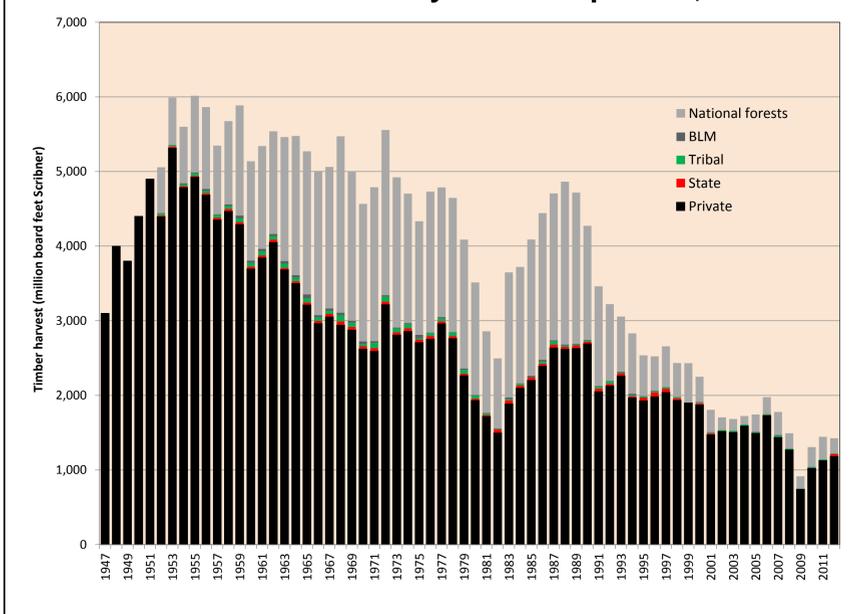
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Introduction:

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

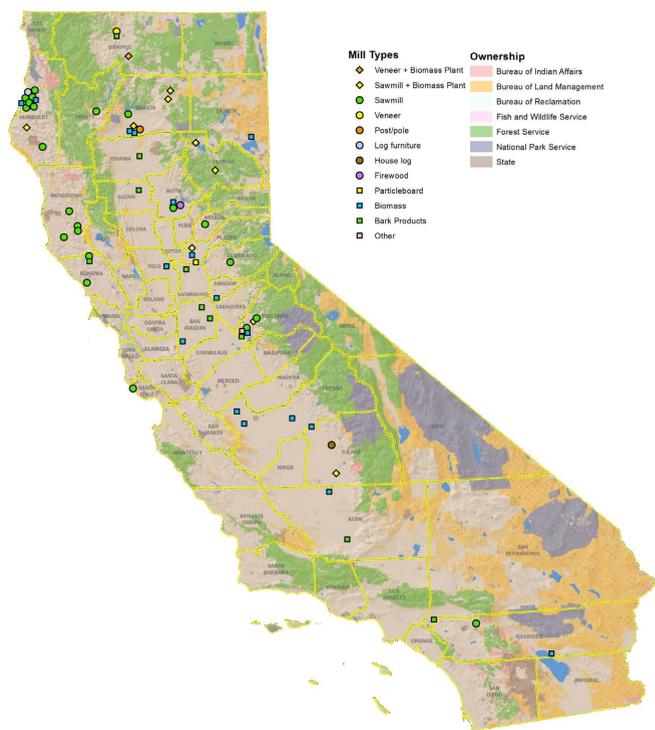
California's timber harvest by ownership class, 1947-2012



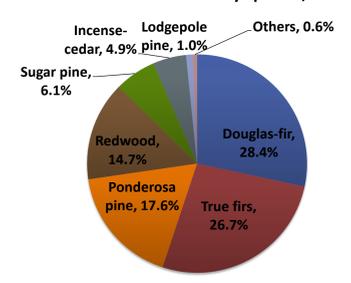
Results and Highlights:

- A total of 77 primary forest products facilities operated in California during 2012:
 - 30 sawmills
 - 26 bioenergy plants
 - 11 bark and mulch facilities
 - 2 veneer plants
 - 8 manufacturers of other primary products
- California's timber harvest was 1,425 million board feet (MMBF) Scribner in 2012, representing an 18 percent decline since 2006. Over 50 percent (785 MMBF) of the timber harvest came from five counties. For the first time since 1968, Shasta County provided the largest proportion at 16 percent (229 MMBF), followed by Humboldt County with a timber harvest of 215 MMBF.
- Eighty-three percent of California's 2012 timber harvest came from private lands, 14 percent came from national forests, and the remaining 3 percent came from other public sources. Nearly all (97 percent) of the timber harvested in California was processed within the state.
- Over half of the 360 million cubic feet (MMCF) of wood fiber (excluding bark) harvested in California in 2012 was used to generate energy, usually in the form of heat for steam or electricity. Another 32 percent of the volume became lumber or was lost to shrinkage and the remaining 16 percent were used as raw material for a variety of other products.
- Total sales value for California's primary forest products was about \$1.4 billion in 2012, with lumber accounting for 65 percent of the total. The majority (77 percent) of all products were sold in California. Two sectors accounted for nearly 90 percent of industry sales value: sawmills and bioenergy plants.
- California's forest products industry's annual capacity to process sawtimber has decreased by more than 70 percent, from 6 billion board feet in the late 1980s to 1.8 billion board feet in 2012. Of this total capacity, 72 percent was utilized in 2012.
- California sawmills produced 1.9 billion board feet of lumber in 2012, just under 7 percent of U.S. production of softwood lumber and just over 5 percent of U.S. consumption.
- Approximately 52,200 workers, earning \$3.3 billion annually, are employed in the forest industry in California, including primary and secondary wood and paper products.
- California's primary facilities produced over 1.9 million bone dry tons (1.6 million bone dry units) of residue; 62 percent was utilized by the biomass energy sector, 26 percent by the landscape and other products sector, 11 percent by the pulp and board sector, and less than 1 percent went unutilized.

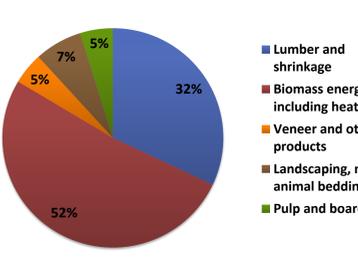
California Primary Timber Processing Facilities and Land Ownership, 2012



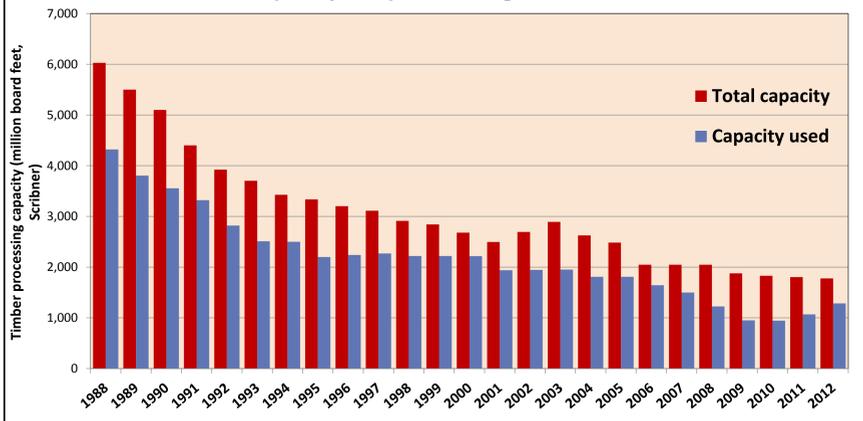
California's timber harvest by species, 2012



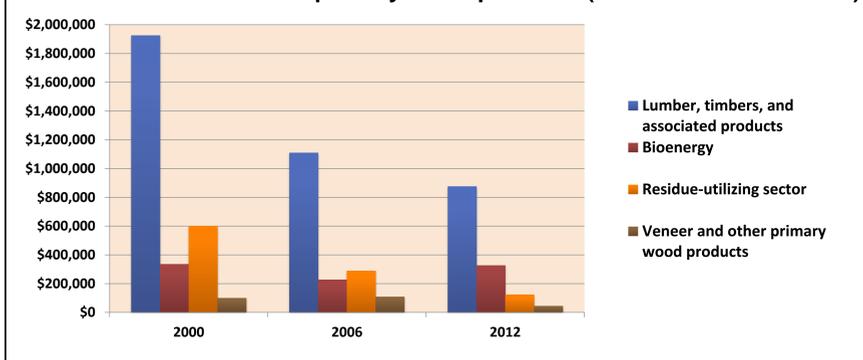
Final disposition of wood harvested in California by industry sector (excluding bark), 2012



California's capacity for processing sawtimber, 1988-2012



Sales value of California's primary wood products (Thousand 2012 dollars)



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