

An Economic Overview of the United States Solid Wood Industry

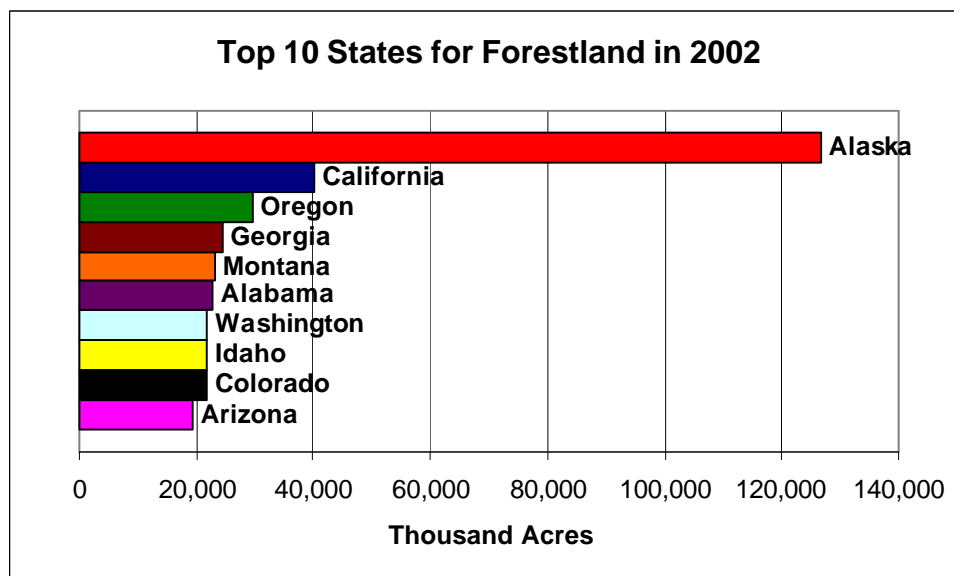
The Forest & Fishery Products Division (FFPD) is dedicated to effectively serving the U.S. forest and fishery sectors and the general public by providing global market analysis, assistance on market access issues, and market development programs and services to help expand U.S. forest and fishery products exports and export opportunities. FFPD promotes the export of U.S. wood products including hardwood and softwood lumber, plywood, veneer, molding, flooring, glue-laminated timbers, oriented strand board (OSB), laminated veneer lumber (LVL), wooden I-joists, wooden doors and windows, prefabricated housing, and other value-added wood products. It does not promote the export of U.S. logs or wood chips. The promoted products are listed under Harmonized Tariff System (HTS) Code Chapters 44 and 9406.

This report identifies and illustrates how individual states contribute to the economic well-being of the U.S. wood industry. Data were compiled into a series of graphs. The main sources used are the USDA Forest Service 2005 Update of the Resource Planning Act (RPA) Assessment (Final) entitled Forest Resources of the United States, 2002, the U.S. Bureau of Labor Statistics and U.S. trade data compiled from the Department of Commerce, U.S. Census Bureau, and Foreign Trade Statistics.

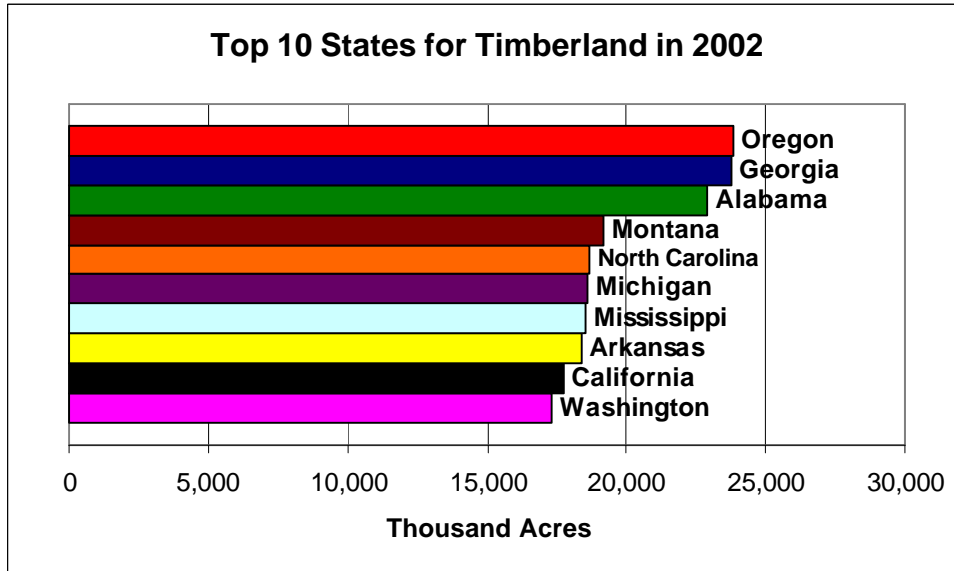
Land Use and Ownership in the United States

Acreage

- About 33 percent of the 2.3 billion acres of land area in the U.S. is forestland
- About 504 million acres of forest land is classified as timberland
- Forest land area increased from 747 million to 749 million acres between 1997 and 2002



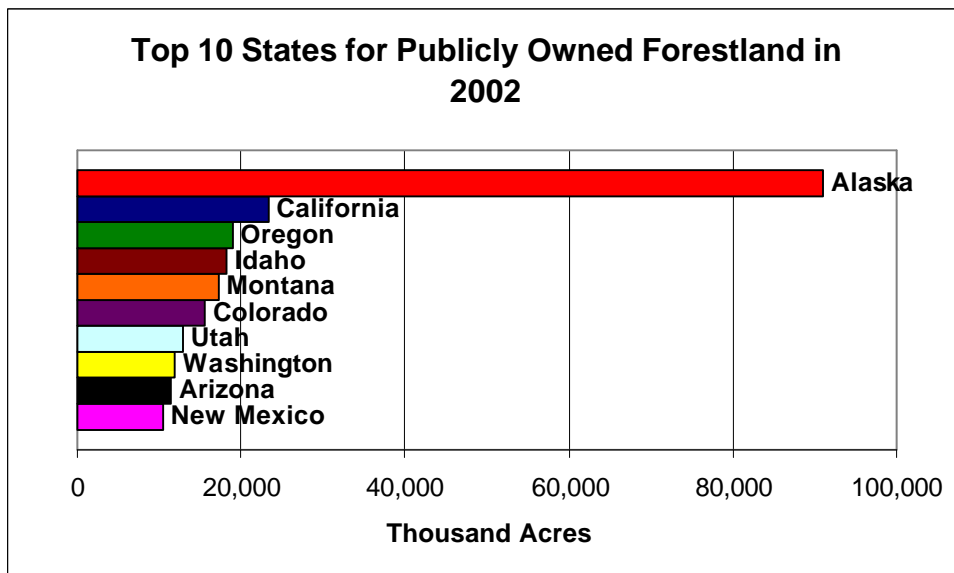
Source: USDA Forest Service, *Forest Resources of the U.S., 2002*



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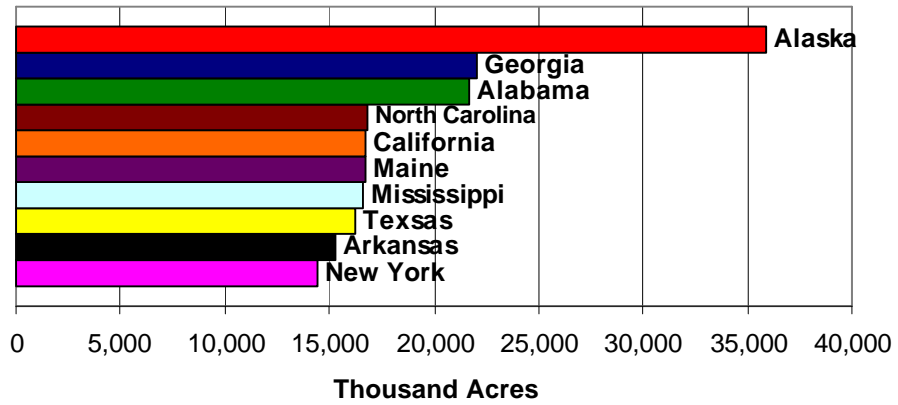
Ownership

- Fifty-seven percent of all forest land is privately owned
- Seventy-one percent of timberland is privately owned
- Non-industrial private ownership made up 58 percent of U.S. timberland
- Industrial private forests accounted for 13 percent of U.S. timberland



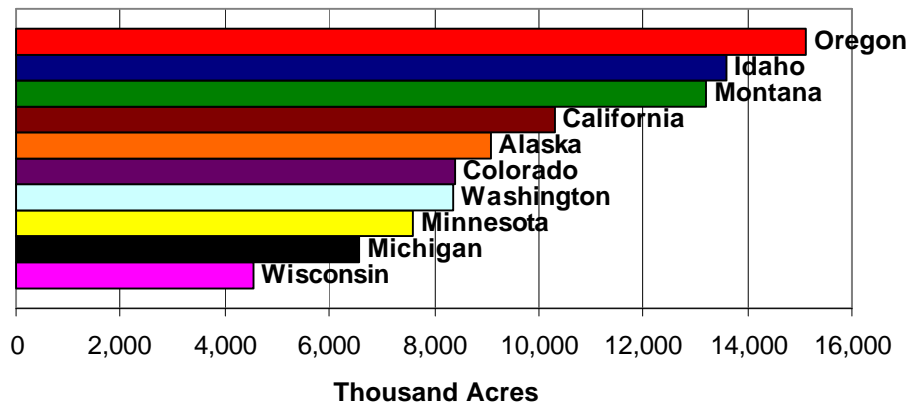
Source: USDA Forest Service, *Forest Resources of the U.S., 2002*

Top 10 States for Privately Owned Forestland in 2002

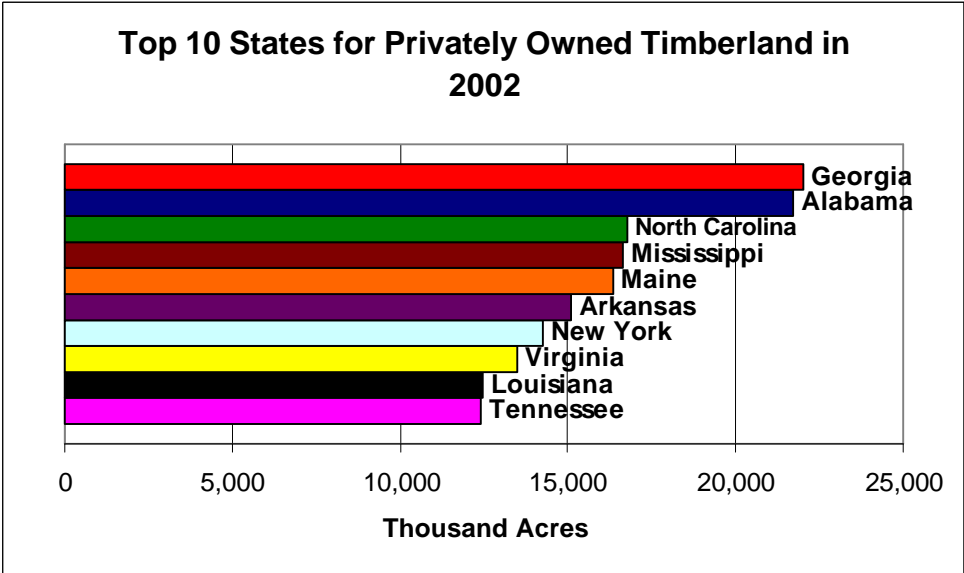


Source: USDA Forest Service, *Forest Resources of the U.S., 2002*

Top 10 States for Publicly Owned Timberland in 2002



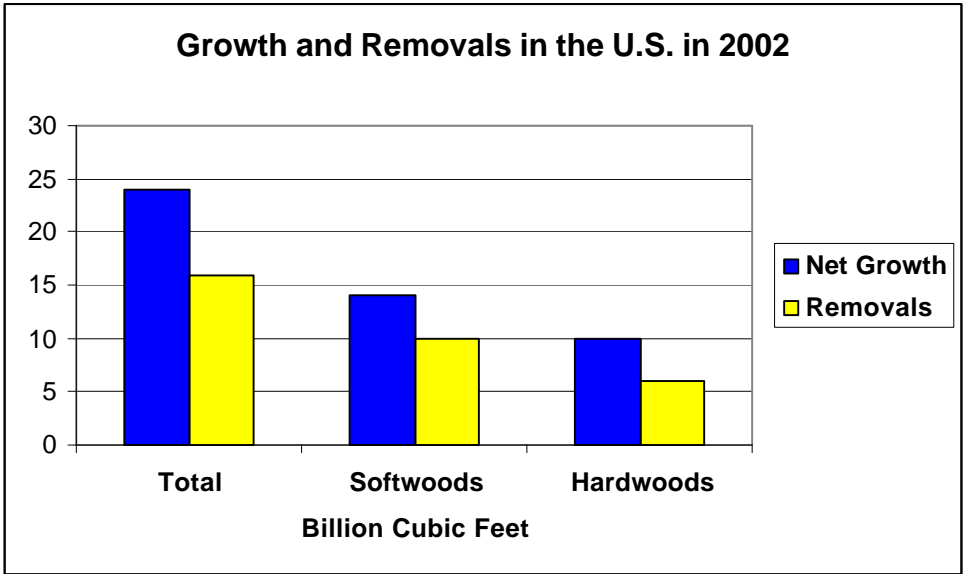
Source: USDA Forest Service, *Forest Resources of the U.S., 2002*



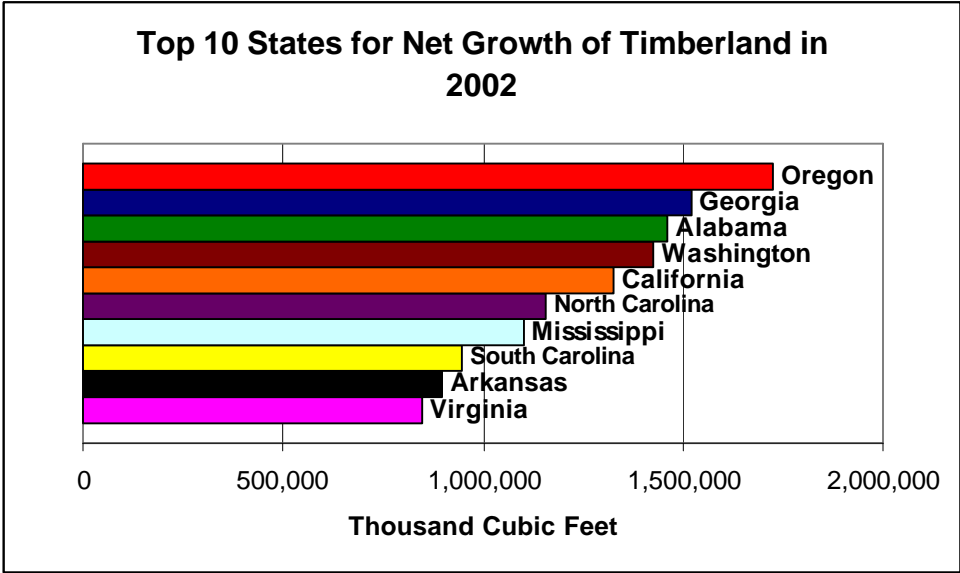
Source: USDA Forest Service, *Forest Resources of the U.S., 2002*

Removals and Plantings

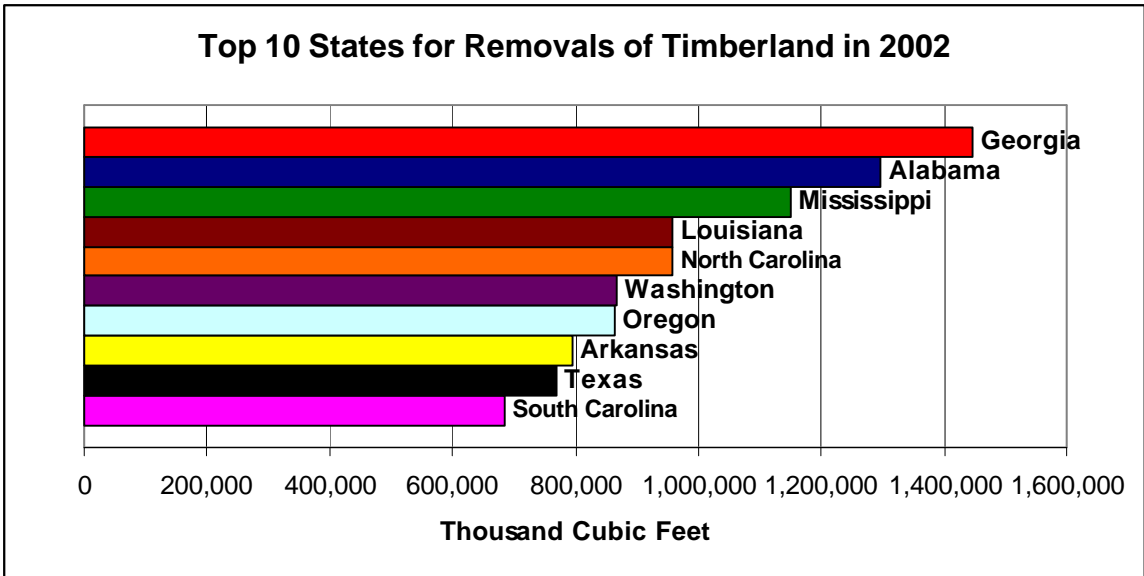
- Net timber growth exceeded harvest by 33 percent in 2001
- Total timber growth increased by about 72 percent between 1952 and 2001
- Hardwood growth exceeded removals by 42 percent, and softwood growth exceeded removals by 26 percent
- Timber harvests have risen by 13 percent since 1976
- In 2001, about 64 percent of the volume of timber removals was softwoods and 36 percent was hardwoods



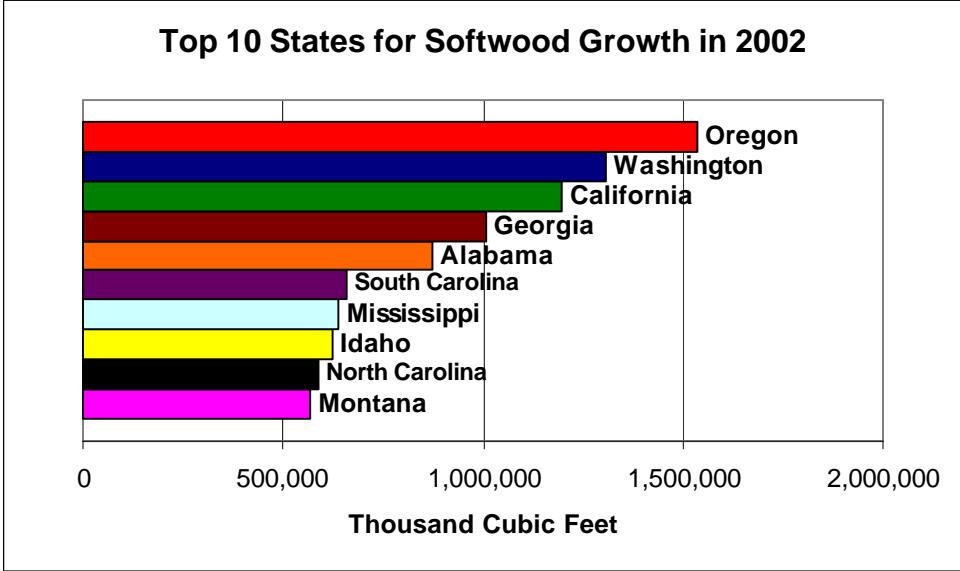
Source: USDA Forest Service, *Forest Resources of the U.S., 2002*



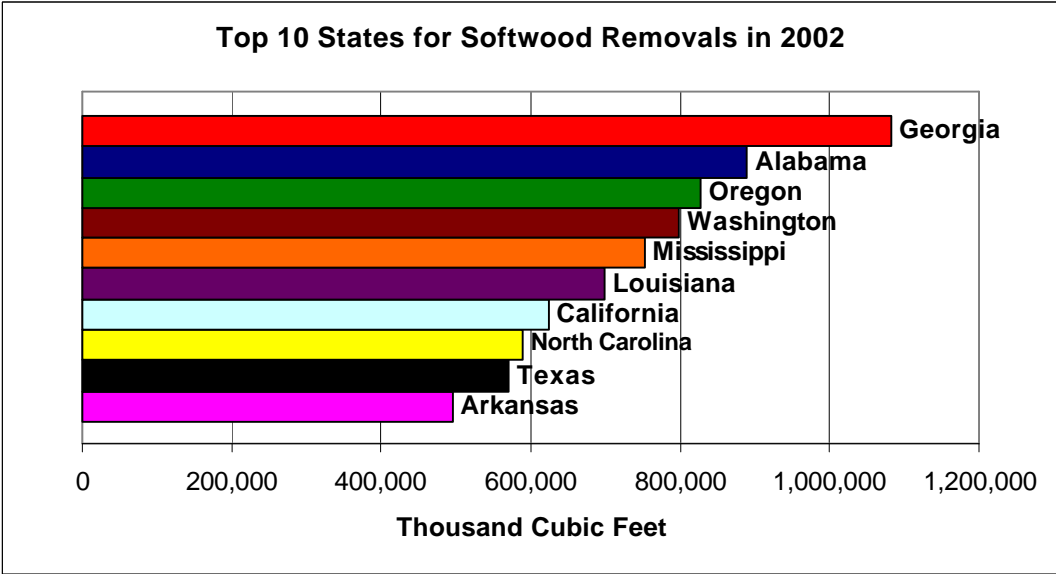
Source: USDA Forest Service, *Forest Resources of the U.S., 2002*



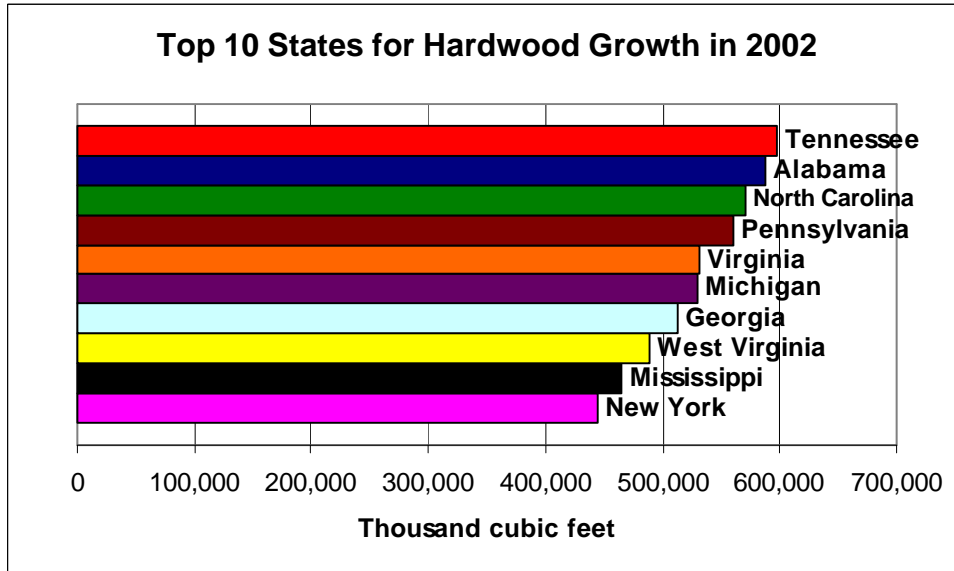
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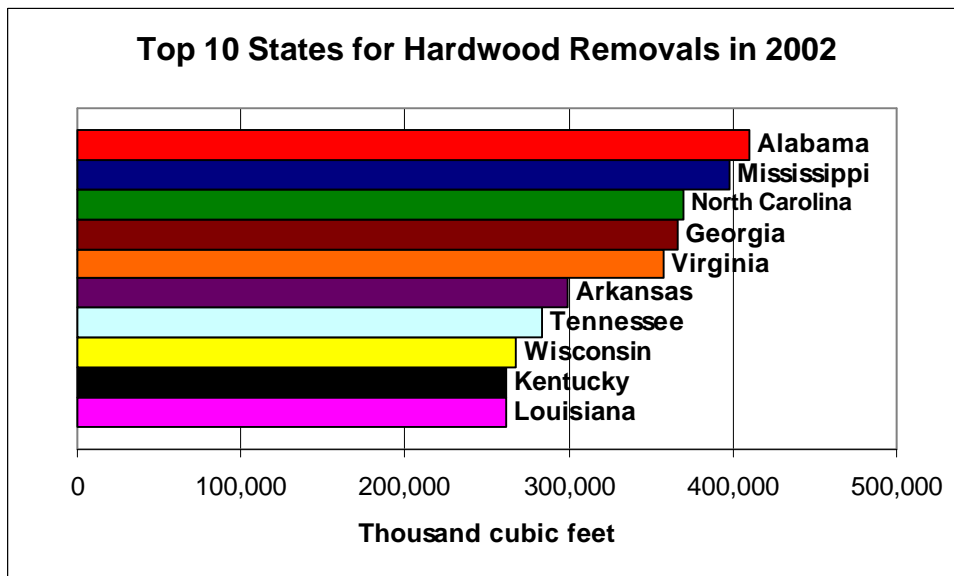
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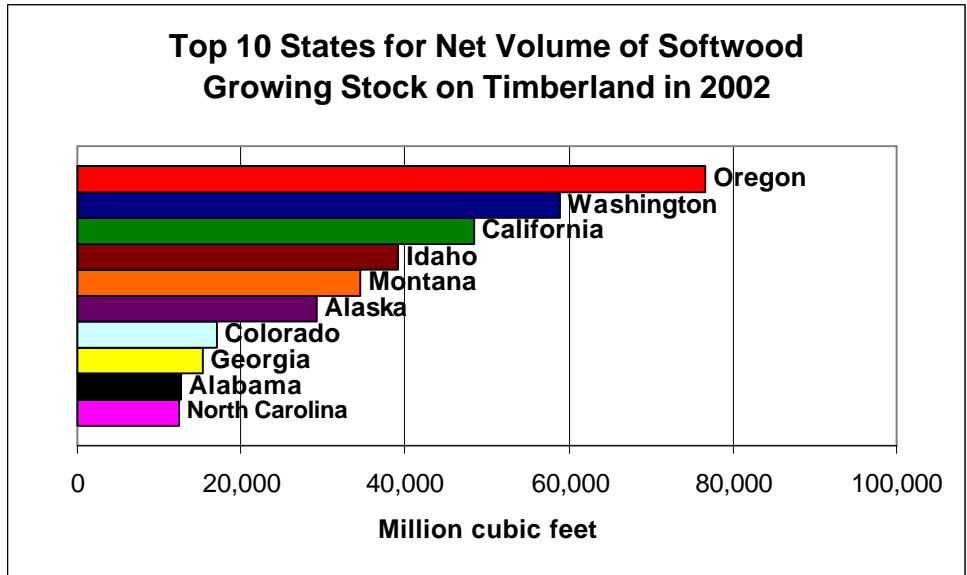
Source: USDA Forest Service, *Forest Resources of the U.S., 2002*



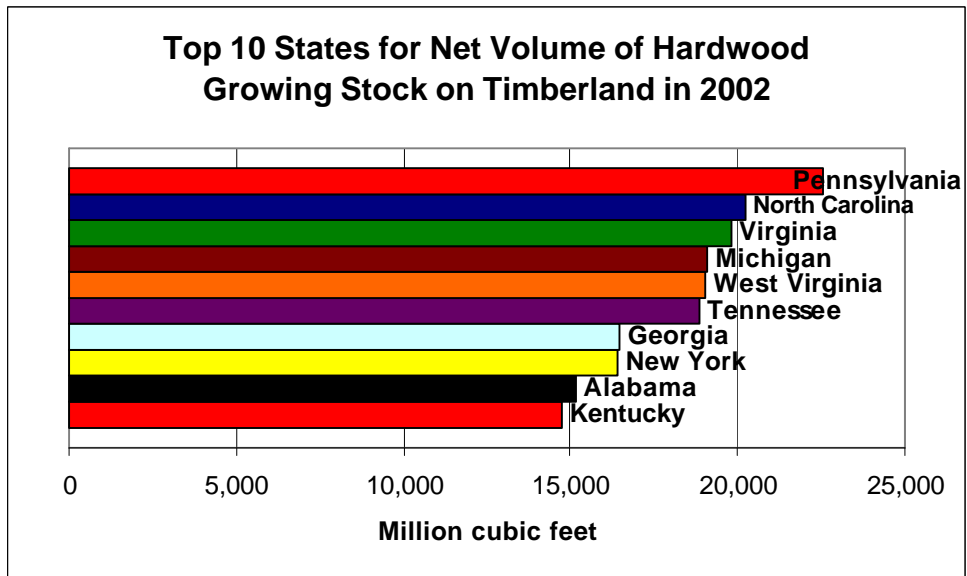
Source: USDA Forest Service, *Forest Resources of the U.S., 2002*

Wood Inventories in the United States

- Growing-stock volume on U.S. timberland increased from 616 billion to 856 billion cubic feet between 1953 and 2002
- About 57 percent of the volume of growing stock is softwoods and the remaining 43 percent is in hardwoods
- Net growing stock volume of U.S. hardwoods increased by 37 percent between 1977 and 2002
- The net volume of U.S. softwoods increased from 432 billion to 492 billion cubic feet between 1953 and 2002



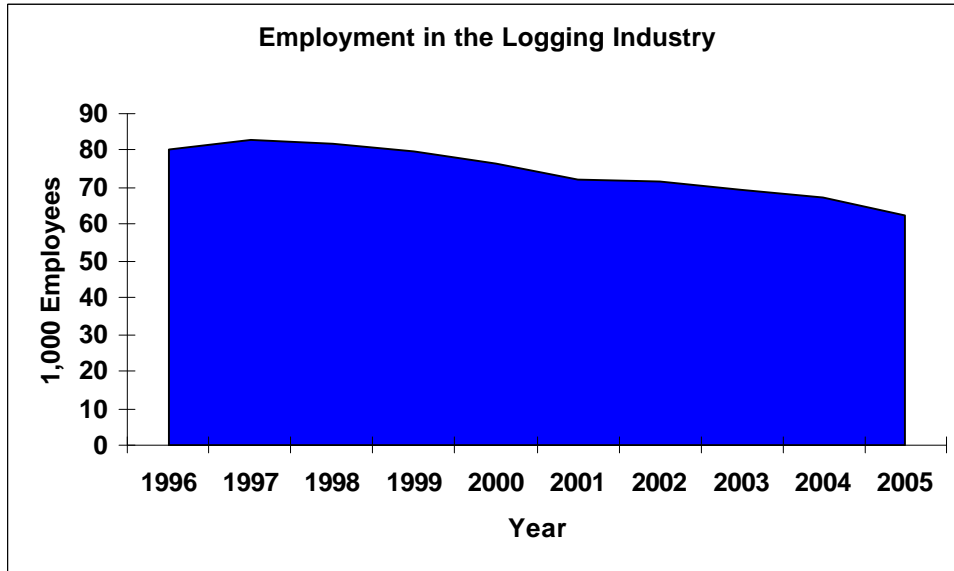
Source: USDA Forest Service, *Forest Resources of the U.S., 2002*



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Wood Industry Employment

- Between 1996 and 2005, the number of employees in the logging industry decreased by over 17,000
- Between 2001 and 2005, the number of employees in the furniture manufacturing industry decreased by about 56,500
- Between 2001 and 2005, the number of employees working in pulp or paper mills decreased by about 32,700



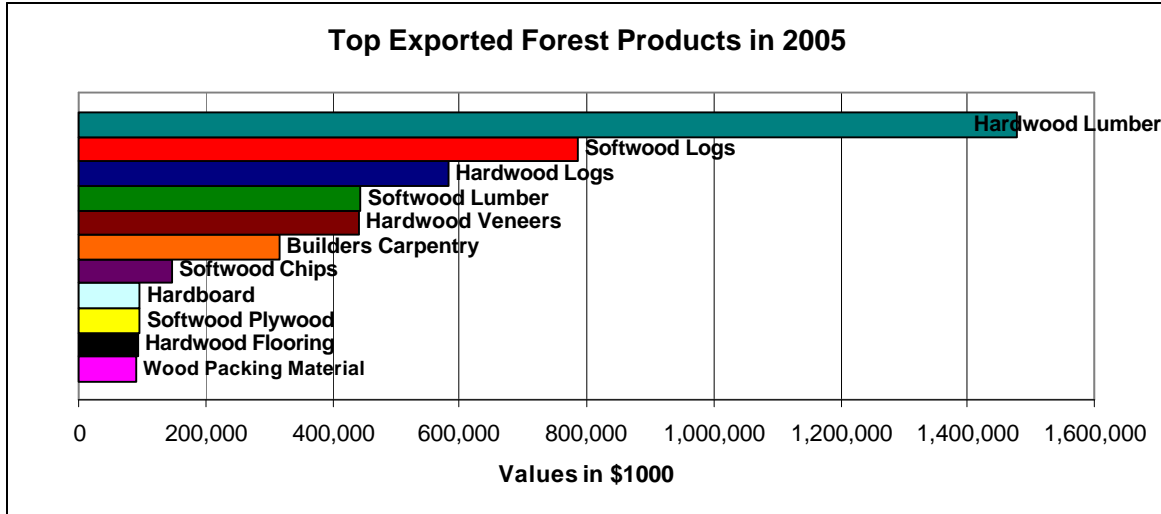
Source: U.S. Bureau of Labor Statistics



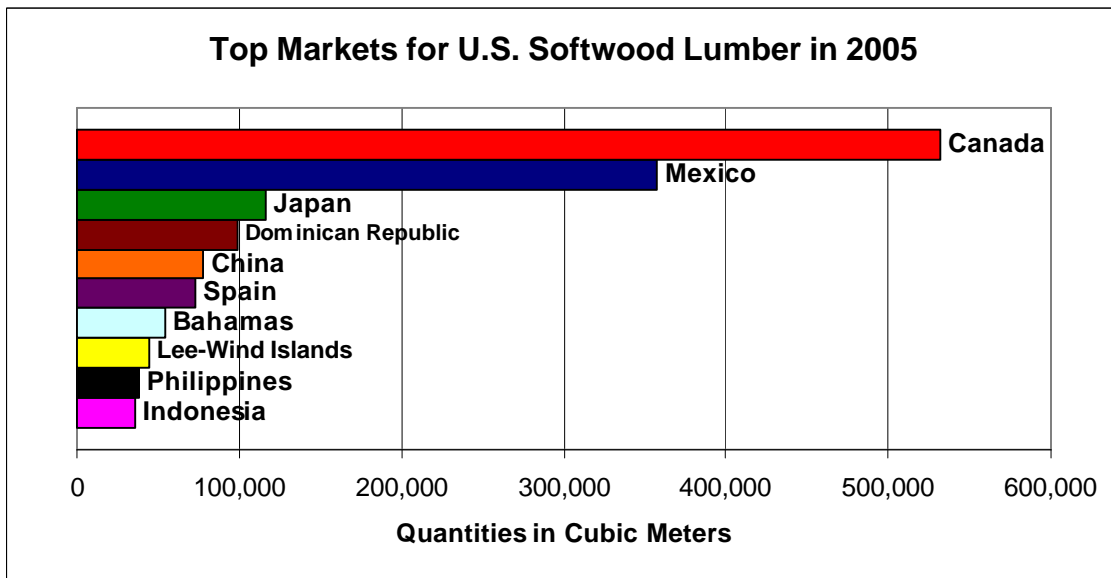
Source: U.S. Bureau of Labor Statistics

Wood Shipments

- Canada is the leading importer of U.S. hardwood and softwood lumber
- World imports of U.S. hardwood lumber in 2005 amounted to 3,009,518 m³
- World imports of U.S. softwood lumber in 2005 amounted to 1,709,303 m³
- In 2005, hardwood lumber was the top exported forest product
- Washington led the nation in exports of wood and articles of wood in 2005
- Over the 6 year period between 2000 and 2005, the value of wood exports via states was \$33,858,874,816



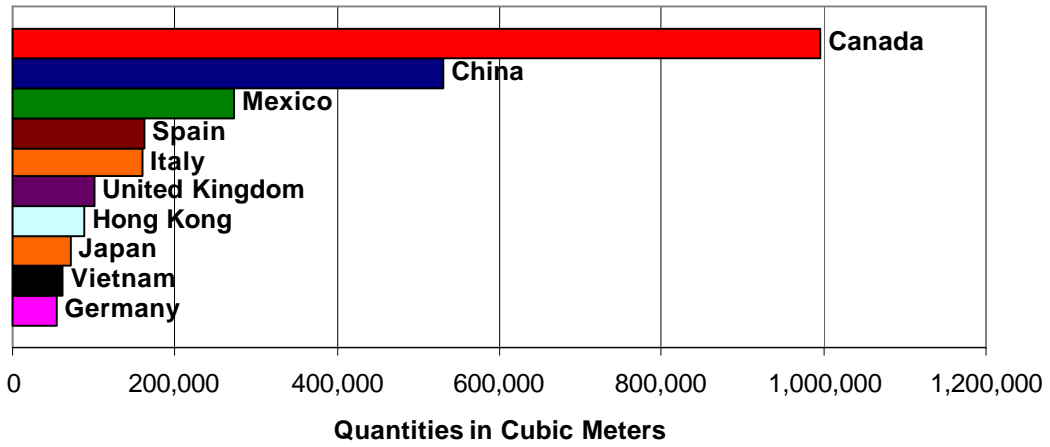
Source: USDA Foreign Agricultural Service U.S. Trade Data¹



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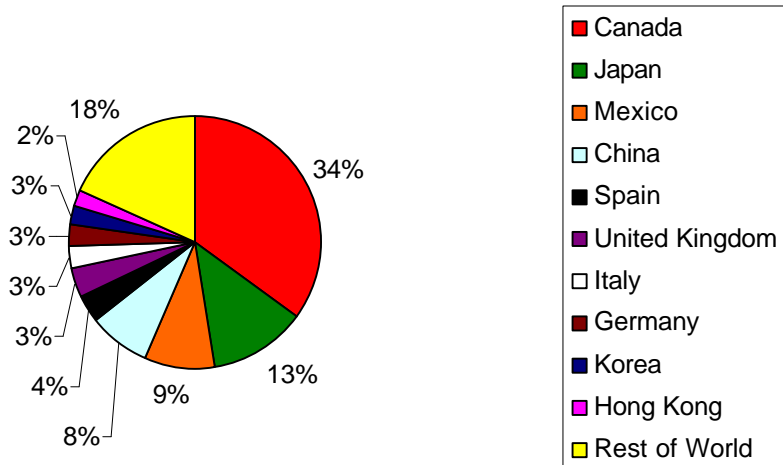
¹ Forest products include: hardwood lumber, softwood logs, hardwood logs, softwood lumber, hardwood veneer, builders carpentry, softwood chips, hardboard, softwood plywood, hardwood flooring, wood packing material, medium density, fiberboard, hardwood plywood, pulpwood, softwood veneers, softwood molding, railroad ties, cooperage products, hardwood chips, prefabricated buildings, treated lumber, poles, particleboard, hardwood molding, softwood flooring, pencil slats, and hardwood siding.

Top Markets for U.S. Hardwood Lumber in 2005

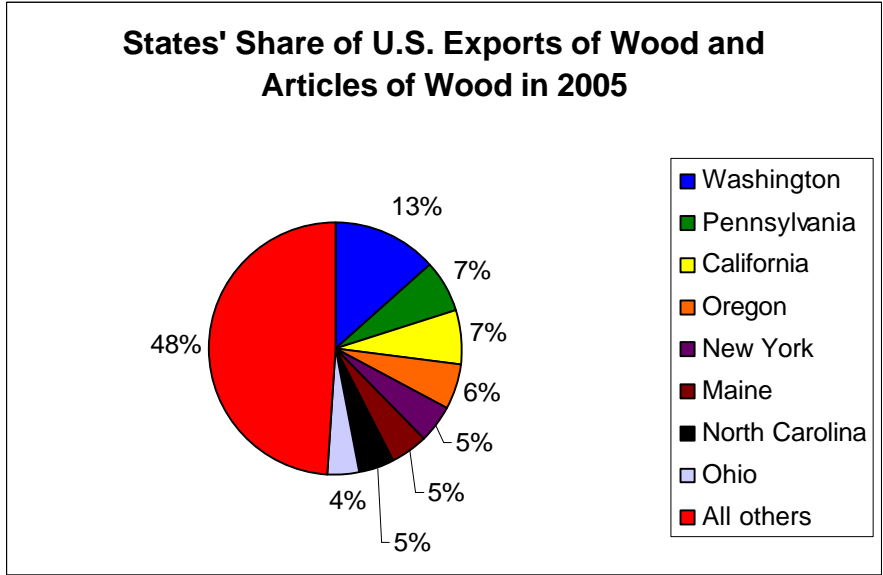


Source: USDA Foreign Agricultural Service U.S. Trade Data

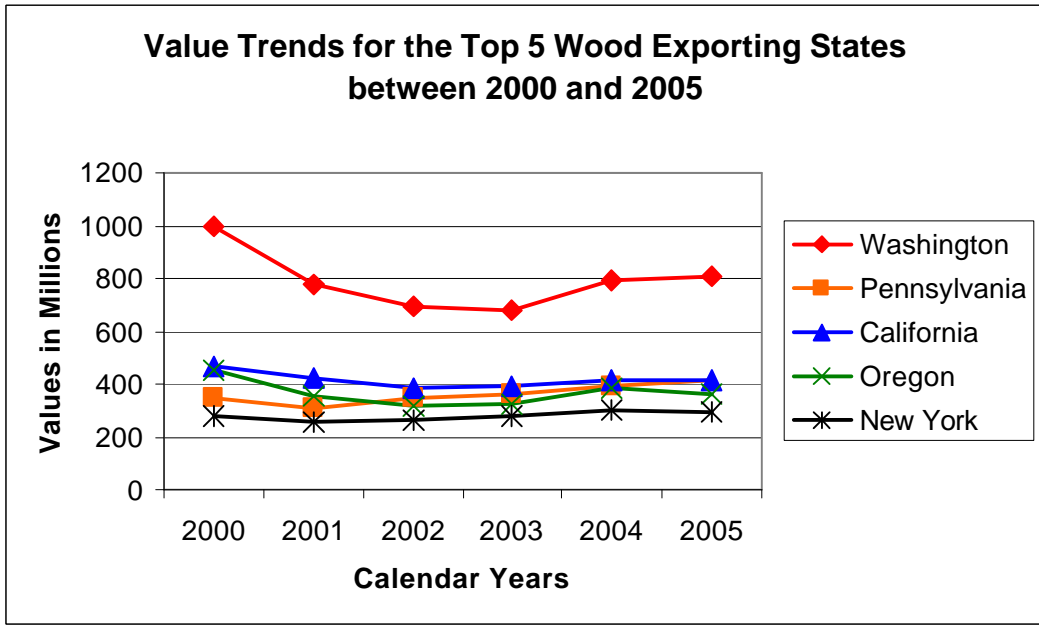
Destination of U.S. Forest Product Exports in 2005



Source: USDA Foreign Agricultural Service U.S. Trade Data

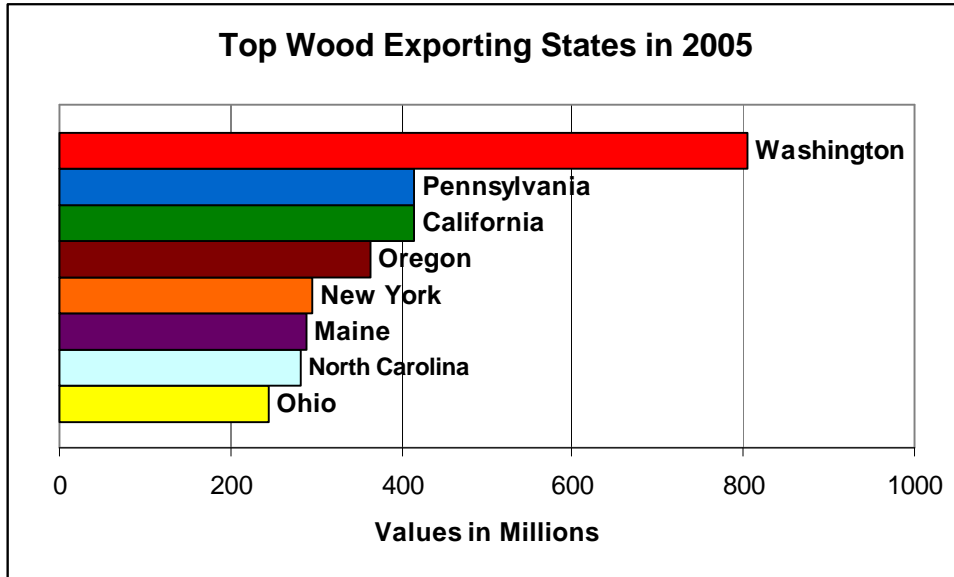


Source: World Trade Atlas, U.S. State Export Edition²

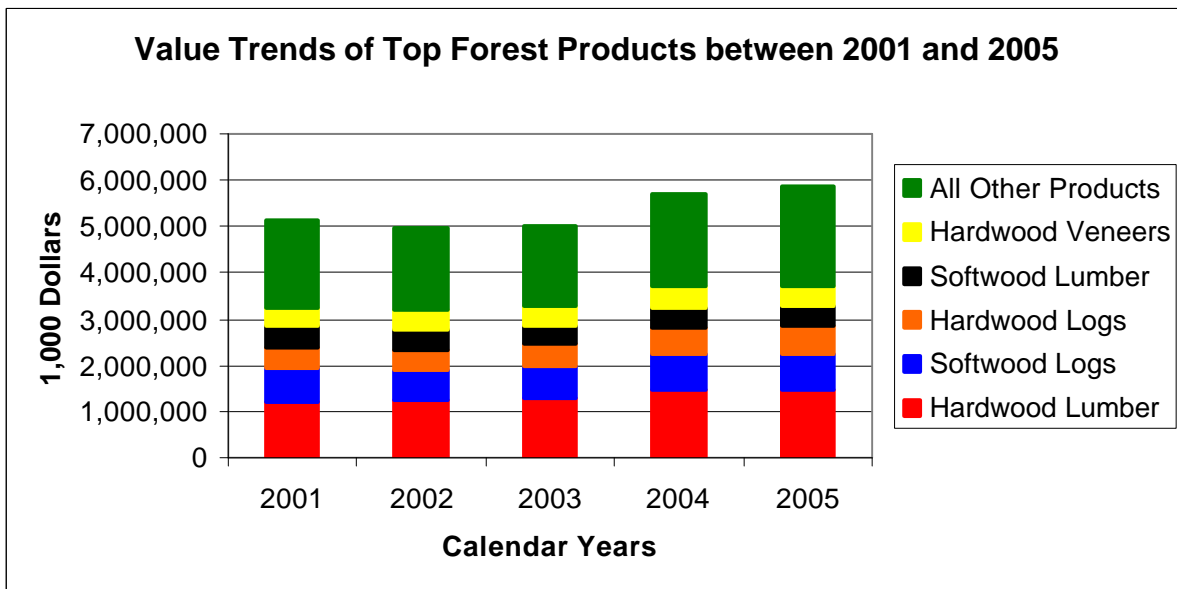


Source: USDA Foreign Agricultural Service U.S. Trade Data
Values in U.S. Dollar

² Export data by state denote the state (as reported by the exporter or agent on the Shipper's Export Declaration) from which the merchandise actually starts its journey to the port of export. This may not be, necessarily, the state where the merchandise is grown, produced or manufactured nor necessarily the actual location of the exporter. In the case of consolidated shipments, it is the state of the commodity of greatest value or the state of consolidation. Foreign Trade Zone shipments are included in the U.S. Total, States/Territories total and distributed among individual states and territories. A separate Foreign Trade Zone total is shown for reference only.



Source: World Trade Atlas, U.S. State Export Edition
Values in U.S. Dollar



Source: USDA Foreign Agricultural Service U.S. Trade Data, Values in U.S. Dollar

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