<u>Mississippi CROP</u>

A Summary of CROP Landscape Analyses Results

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Mississippi CROP: *Mt. Olive, MS (centerpoint)* (100 miles N/S; 60 miles E/W)



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- 4 National Forests
- 5 Ranger Districts
- 43 Counties
- State Lands
- 16th Section Lands
- Private Lands (Katrina-downed)

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National Forests: 5 Ranger Districts

• <u>Bienville NF</u>:

Bienville RD

• <u>Delta NF</u>:

Delta RD

• <u>De Soto NF</u>:

De Soto RD Chickasawhay RD

• <u>Homochitto NF</u>:

Homochitto RD

State Lands:

 Mississippi Dept. of Wildlife, Fisheries, & Parks

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43 Counties:

- Sharkey
- Claiborne
- Amite
- Copiah
- Yazoo
- Attala
- Scott
- Lawrence
- Walthall
- Pearl River
- Jackson
- Forrest
- Wayne
- Jasper
- Newton

- Perry
- Jones

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- Lauderdale
 - Warren
 - Franklin
- Lincoln
- Madison
- Holmes
 - Rankin
- Smith
- Covington
- Lamar
 - Harrison
 - George

- Clarke
- Neshoba
- Issaquena
- Jefferson
- Pike
- Hinds
- Humphreys
- Leake
- Simpson
- Jefferson Davis
- Marion
- Hancock
- Stone
- Greene

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CROP also includes <u>16th Section lands</u>: (lands managed by state for benefit of school systems)

- 43 counties in CROP landscape with 16th Section lands
- Data & diameter breakout received from MIFI.
- Between '01 through '05, amount in CROP landscape removed was:

Pine: 99 mmbf + 396,000 gT Hardwood: 32 mmbf + 114,000 gT

- Of 43 counties, only 18 experienced <u>annual</u> removals between '01 '05
- Estimates in CROP based only on those counties with historical annual removals. <u>Averaged annual removal</u> volumes calculated.

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CROP also included analysis on <u>Katrina-downed pine</u> <u>& hardwood</u>:

- Data for 15 southern counties supplied by MIFI.
- Assumption for diameter, decay rate, & remaining usable material (blue stain, heartwood, & hardwood) supplied by MIFI, with technical assistance also provided by MSU (Dr. Terry Amburgey



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What we asked for:

- Volume (by mmbf, green tons, ccf, etc.)
- Diameter sizes <<4" 4"-7" 7"-9" 9"-12" >12"
- **Species** (all species evaluated for resource flow)
- Harvest "type": fuel load reduction, timber sale, etc.

USFS Pilots

- Location of resource offering
- NEPA Phase
- Road accessibility

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So, let's take a look at the final results . . .



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Overall:

Year	Total Biomass (227,625 gT)	% of 5-yr volume	Tota (109	l Small Log 9.547 mmbf)	% of 5-yr volume	Total Large Log (111.491 mmbf)	% of 5-yr volume
2007	37,605	16%		21.855	20%	28.586	26%
2008	34,800	15%		16.92	15%	17.66	16%
2009	15,190	7%		25.677	24%	32.609	29%
2010	51,890	23%		24.815	23%	25.486	23%
2011	88,140	39%		20.28	18%	7.15	6%

Biomass = 17% (up to 7" dbh) Small Logs = 41% (>7" - 12" dbh) Large Logs = 42% (>12" dbh)

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Who's providing what?

Agency	5-yr total Biomass (gT)	5-yr total Small Log (mmbf)	5-yr total <i>Large Log (mmbf)</i>	% of 5-yr total
De Soto NF	136,250	63.123	38.063	48%
Bienville NF	62,400	25.32	25	24%
Homochitto NF	28,975	17.985	35.278	22%
Delta NF	0	3	12	6%
MS DWF & P	0	.119	1.15	<1%

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Is there a change? Overall – Yes!

A 3% *reduction* in planned removal off all National forests in CROP landscape.

	'01-'05 (mmbf)	'07-'11 (mmbf; includes gT)	% change
Delta NF	10.95	15	37%
Bienville NF	38.33	62.8	61%
De Soto NF	104.05	128.44	23%
Homochitto NF	120.48	59.06	(-51%)
Total	273.81	265.3	(-3%)

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Where's the change?

Let's look at the De Soto NF:

... an increase of 23% in planned volume removal.

	'01-'05 (mmbf)	'07-'11 (mmbf; includes gT)
Southern Yellow Pine	62.72	108.436
Waxy Species	0	20
Oaks (red, black, white)	1.78	0
Hardwoods	9.83	0
Other Softwoods	29.71	0
Total	104	128.436



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But . . . for the Homochitto NF a different story . . .

... a more impactful change with 60% reduction in planned volume removal during the next 5 years

	'01-'05 (mmbf)	'07-'11 (mmbf; includes gT)
Southern yellow pine	72.62	49.43
Oaks (red, white, black)	2.07	3.84
Hardwood – other	11.371	5.76
Softwoods – other	34.39	0
Total	120.45	59.06

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A closer look on resource offering . . .

De Soto NF: (gT=136,250; Small log = 63.123 mmbf; Large log = 38.063 mmbf)

Ranger Districts	5-yr total (Biomass = gT) <7" dbh	5-yr total Small log (mmbf) 7"-12" dbh	5-yr total Large log (mmbf) >12" dbh
De Soto RD	100,000	26.873	9.063
Chickaswawhay RD	36,250	36.25	29



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A closer look on resource offering . . .

Bienville, Homochitto, & Delta NFs:

Ranger District	5-yr total (Biomass = gT) <7" dbh	5-yr total Small log (mmbf) 7"-12" dbh	5-yr total Large log (mmbf) >12" dbh
Bienville NF (RD)	62,400	25.32	25
Homochitto NF (RD)	1,592	2.092	1.435
Delta NF (RD)	0	3	12



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A closer look on resource offering . . .

MS Agencies: (gT= 0; Small log = .119 mmbf; Large log = 1.15 mmbf)

Agency	5-yr total	5-yr total	5-yr total
	(Biomass = gT)	Small log (mmbf)	Large log (mmbf)
	<7" dbh	7"-12" dbh	>12" dbh
MS DWF &P	0	.119	1.15



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NF & State removals by Species*	5-yr total (Biomass = gT)	5-yr total Small log (mmbf)	5-yr total Large log (mmbf)
Red oak (3% of 5-yr. total)	1,152	2.5386	6.387
Hardwoods (2% of 5-yr. total)	192	.9231	3.0645
Green ash (1% of 5-yr. total)	0	.36	1.44
Gum species (4% of 5-yr. total)	4,472	5.1311	3.9823
Southern yellow pine (80% of 5-yr. total)	157,245	87.4895	93.734
Oak species (2% of 5-yr. total)	3,000	3.365	1.9078
Poplar (1% of 5-yr. total)	974	1.0432	.5522
Hickory (0% of 5-yr. total)	590	.697	.4232
Waxy species (8% of 5-yr. total)	60,000	8	0

*9 species analyzed in CROP, but Southern Yellow Pine comprises 80% of the total 5-yr volume

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16th Section lands:

- 1) Three regions (Delta River, Central, & Southern)
- 2) 43 counties in CROP but only 18 with <u>annual</u> removal performance from '01 through '05.
- 3) For this CROP, used averaged annual removal from those 18 counties to derive projected annual CROP offering.



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16th Section lands:

18 counties (in CROP landscape) with <u>annual</u> removal performance:

South Region: (9 of 22 counties)

•Amite

•Copiah •Franklin	Central Region	: (7 of 14 counties)
•Jefferson Davis	•Clarke	
•Jones	•Hinds	
•Lincoln	•Jasper	
•Marion	•Newton	
•Walthall	•Scott	<u>Delta/River Region</u> : (2 of 7 counties)
•Wayne	•Simpson	•Jefferson
	•Smith	•Warren



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16th Section lands:

Projected <u>annual</u> removal based on averaged annual removal from '01 – '05:

	Biomass gT	Small log (mmbf)	Large log (mmbf)
Central Region	31,621	2.18	2.65
South Region	35,910	3.16	3.77
Delta Region	3,581	.8	1.32
Annual totals	71,112	6.14	7.74



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Katrina-downed resource (one-time volume):

- 15 southern counties evaluated.
- Initial downed data collected by Mississippi Institute of Forest Inventory (MIFI).
- Diameter breakout, decay rates, usable blue stain (pine) volume, heartwood (pine) volume, & hardwood volume determined (with MIFI & MSU guidance).
- Volume breakouts provided on county-bycounty basis.
- All volume <9" for pine and <7" for hardwood calculated as biomass.



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Collectively, four (4) of the 15 counties contribute the 40% or more of the total Katrina-downed <u>pine</u> volume:

Harrison
Pearl River
Perry
Stone

Five (5) of the 15 counties contribute 40% or more of the total Katrina-downed <u>hardwood</u> volume:

Greene
Harrison
Pearl River
Stone
Wayne

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Katrina-downed resource:

Initial projections:

ightarrow

- pine:1.958 mmbf (7% in biomass; 48% mmbf in
small log; 40.1% mmbf in large log)
- <u>hardwood</u>: 1.358 mmbf (10.6% in biomass; 37.2% mmbf in small log; 52.2% mmbf in large log)

Current projections:

- pine (49% already removed): 994.3 mmbf (46% in biomass; 24% mmbf in small log; 30% mmbf in large log)
- <u>hardwood (39% already removed)</u>: 833.38 mmbf (31% in biomass; 35% mmbf in small log; 34% mmbf in large log)

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Katrina-downed resource: (Projections based on best guess current conditions)

		Small log – 7"-12" (mmbf)			L	arge log - >12 (mmbf)	2"
	biomass (gT)	blue stain	ue stain heartwood hardwood			heartwood	hardwood
pine	2,261,764	45.25	193.88		82.93	219.89	
hardwood	1,275,840			293.83			284.38

Summary:

usable blue stain (pine)	128 mmbf
usable heartwood (pine)	413.7 mmbf
usable hardwood	578.21 mmbf
biomass	3,537,604 gT



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Overall CROP Resource Offering: (total for 5 years)

	Small log		Large log		Biomass	
	(7 (mmbf)	7"-12") % of type offering	((mmbf)	>12") % of type offering	(gT)	% of type offering
NF & State	109.55	41%	111.49	42%	227,625	17%
16 th Section	30.795	22%	38.73	28%	355,560	50%
Katrina-downed (one-time volume)	532.46	29%	587.2	32%	3,537,604	39%
Totals	673.30		737.42		4,120,789	

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So . . . What does all this mean?

- Excluding Katrina-downed volume, opportunity for inviting new production investment into the region is tight, but do-able:
 - ~ 28 mmbf/yr of small logs available for processing (includes ~ 6 mmbf/yr of 16th Section lands removal) is less encouraging for investment, as *volume may be too small for a constructing a dedicated small-log processing mill*. The volume, however, is *sufficient to encourage the construction of a small log processing line* to an existing milling operation.
 - Another 30 mmbf/yr of large logs (includes ~ 7 mmbf/yr of 16th Section lands removal) for processing in existing operations may also be made available.

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So . . . What does all this mean?

From a *biomass* basis:

- The proposed biomass to be generated from the National Forests is likely significantly underestimated. The 16th Section lands on average generated three times *less* small and large log volume over the last 5 years than what is expected from the National Forests in the CROP landscape during the next five years, but generated over 50% more biomass volume.
 - The NF and 16th Section biomass volumes combined at ~ 117,000 gT/yr is still considered a small volume offering for typical biomass investors. Further, high variability in annual biomass offering from NF lands in the CROP landscape make the risk factor even higher.
 - However, the six-fold increase per year in biomass that could be generated from Katrina-downed resource in the CROP landscape should be of interest to potential investors.

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So . . . What does all this mean?

- Aside from biomass, the updated volume of Katrina-downed resource for solid wood production should not be ignored!
 - 25 mmbf/year of *usable blue stain pine* to be sold into the characterwood market;
 - 82 mmbf/year of *usable heart pine*; and
 - Over 115 mmbf/year of *hardwood*.



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Resource Offering Maps (ROMS): *Here's what you get <u>for each species</u>...*

- ✓ <u>Who</u> will supply?
- ✓ *When* will supply be offered?
- ✓ How much will be offered?
- ✓ *What diameter size* will it be offered in?
- ✓ Will supply be consistent and *levelized over* time to invite purchase and investment?



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For each species:

- ✓ Locator map per specific supplier
- ✓ <u>Summary sheet</u>
- ✓ <u>Detailed supply breakouts</u> by volume, diameter, and year

Let's look at Southern Yellow Pine as an example ...



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Locater Map

*italics/bold = species offering in CROP

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Mississippi: Southern Yellow Pine CROP offering/removal '07 - '11 ROM # SYP 1 (g1 157,245 / S = 87,489 mmbf / L = 93.734 mmbf)gT = green tons (up to 7" dbh) $S = small \log mmbf (>7"-12" dbh)$ $L = large \log mmbf (>12" dbh)$ **Summary Sheet** Delta NF Homochitto NF: 1 RD – 23% Bienville NF: 1 RD – 25% (gT = 24,995 / S = 12.746 / L = 31.691)(gT = 56.000 / S = 19.55 / L = 22.85)**Bienville NF** MS DWF & P – <1% De Soto NF: 2 RDs - 51% Homochitto NF (gT = 0 / S = 0.07 / L = 1.13)(gT = 76,250 / S = 55.123 / L = 38.063)De Soto N All Agencies: Southern Yellow Pine (5-yr total = 212.672 mmbf)31.449 mmbf is <7" = 15,724 gT of biomass 87.489 mmbf is >7"-12" = small logs gT mmbf 93.734 mmbf is >12" = large logs Biomass Small Log Large Log 2007 32725 17.51 25.153 12300 14.51 14.59 2008 >12 " 50 **-**>7" - 12 22.7815 2009 14190 28.392 >9 " - 12 " 2010 30890 17.918 21.269 40 □>7"-9" mmbf 67140 14.77 2011 4.33 **-**<7" 3(■>4"-7" Totals 157245 87.4895 93.734 •4" 15% 41% 44% % mmbi 31.449 212.6725 2007 2008 2010 2011 2009

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Detailed Breakout by Supplier

Southern Yellow Pine De Soto NF: Chickasawhay RD	5-yr = 72.5 mmbf; 14.5 mmbf/yr			
	• Level supply from year to year			
gT = 36,250	 <4" = 0% (0 mmbf) >4"-7" = 0% (0 mmbf) <7" = 10% (7.25 mmbf) 			
S = .36.25	 >7"-9" = 0% (0 mmbf) >9"-12" = 0% (0 mmbf) >7"-12" = 50% (36.25 mmbf) 			
L = .29	• >12" = 40% (29 mmbf)			



'07 – '11



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SO . . . with CROP, we're able to look at:

- *performance between different public agencies* to identify needed levilization of supply; <u>and</u>
- performance between ranger districts in a single <u>NF</u> to see where levilization of supply offering might be needed .

Let's take a look ...



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Southern Yellow Pine: De Soto NF - 2 RD - biomass offerings

(% of NF offering of 76,250 gT)

De Soto RD - 52%

De Soto NF: De Soto RD: Southern Yellow Pine Total 5-yr *Biomass* (up to <7" dbh) by Specie (8 mmbf = 40,000 gT)



Chickasawhay RD - 48%

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Unlevelized supply in both RDs with no offering in most of the years.



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Southern Yellow Pine: De Soto NF 2 ROS – <u>small log</u> offerings (% of NF offering of 55.123 mml.f)

De Soto RD - 34%

Chickasawhay RD - 66%

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De Soto NF: Chickasawhay RD: Southern Yellow Pine Total 5-yr Small Log (>7"-12" dbh) by Specie (36.25 mmbf)

Unlevelized supply in 1 of 2 RDs



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Southern Yellow Pine: De Soto NF 2 RDs – <u>large log</u> offerings (% of NF offering of 38.063 mmbf)

De Soto RD - 24%

De Soto NF: De Soto RD: Southern Yellow Pine Total 5-yr *Large Log* (up to >12" dbh) by Specie (9.063 mmbf)



Chickasawhay RD - 76%



Relatively levelized supply in only one RD.



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How levelized will the supply be for all suppliers of Southern Yellow Pine compared to other species offering?

Let's take a look . . .



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Levelized supply for five years?

(R = relatively)

	g Bior	T mass	Sn Lo	nall ogs	Large Logs	
(% of total CROP vol.)	yes	no	yes	no	yes	no
Southern yellow pine (80%)		\checkmark	R			~
Waxy species (8%)		\checkmark		✓	n/a	
Gum species (4%)		\checkmark	R		R	
Red oak (3%)	R			✓		✓
Hardwoods (2%)	R		✓		✓	
Oak species (2%)		✓		✓	R	
Poplar (1%)		✓		✓		✓
Green ash (1%)	n/a		✓		✓	
Hickory (<1%)		✓		\checkmark		~

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Looking at the *Southern Yellow Pine*...

- ✓ There will be an <u>unlevelized supply of green tonnage biomass in this</u> <u>specie offering</u> over the next five years. Variations range from 15,000 to 88,000 gT per year.
- ✓ This will impact almost 70% of the total biomass volume for all species to be offered in the CROP landscape (excluding 16th Section & Katrina volumes).
- ✓ There will also be a <u>an unlevelized supply of large log volume in this</u> <u>specie offering</u> in the CROP landscape that will affect 84% of the total large log volume.
- ✓ Small log volume variations per year are less dramatic.

Here's how it looks on an agency-by-agency basis ...

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Levelized Annual Supply?

(Total 5-yr volume)

Y = yes $N = no$				
R = relati O = no oj N/A = no	Southern Yellow Pine (212.672 mmbf; includes gT) Biomass Small log Large log			
De Soto NF	(51% of 5-vr vol.)			
	De Soto	N/A	Ν	Ν
	Chickasawhay	N	Y	R
Bienville NF	(25% of 5-yr vol.) Bienville	R	R	R
Homochitto NF	(23% of 5-yr vol.) Homochittto	N	N	N
MS DWF & P	(<1% of 5-yr vol.)	N/A	Y	Ν

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Levelized Supply? Southern Yellow Pine – <u>biomass</u> (157,245 gT)

K – retaitvety					
NS = no supply offering	yes	no	Comments		
Overall		✓	from 12,300 gT to 67,140 gT/yr		
De Soto NF					
De Soto RD		✓	from 0 gT to 20,000 gT/yr		
Chickasawhay RD		v	from 0 gT to 36,250 gT/yr		
Bienville NF		✓			
Bienville RD			from 8,800 to 17,800 gT/yr		
Homochitto NF					
Homochitto RD		\checkmark	from 1,090 to 4,390 gT/yr		
Delta NF					
Delta RD	NS				
MS DWF & P	NS				

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Levelized Supply? Southern Yellow Pine – <u>small log</u> (87.489 mmbf)

R = relatively

NS = no supply offering	yes	no	Comments
Overall	R		from 14.51 mmbf – 22.781 mmbf variations/yr
De Soto NF			
De Soto RD		~	from 2 mmbf to 8.873 mmbf
Chickasawhay RD	✓		7.25 mmbf/yr
Bienville NF			
Bienville RD		✓	from 3.5 mmbf to 5.25 mmbf
Homochitto NF			
Homochitto RD		~	from 0 mmbf to 6.45 mmbf
Delta NF	NS		
MS DWF & P	R		from .01 mmbf to .02 mmbf/yr

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Levelized Supply? Southern Yellow Pine – <u>large log</u> (93.734 mmbf)

R = relatively			
NS = no supply offering	yes	no	Comments
Overall		~	from 4.33 mmbf – 28.392 mmbf variations/yr
<i>De Soto NF</i> De Soto RD		✓	from 0 mmbf to 7.063 mmbf
Chickasawhay RD	R		7.25 mmbf/yr save for '11
<i>Bienville NF</i> Bienville RD	R		from 4.15 mmbf to 5.25 mmbf
<i>Homochitto NF</i> Homochitto RD		✓	from 0 mmbf to 12.413 mmbf
Delta NF	NS		
MS DWF & P	R		from .18 mmbf to .29 mmbf/yr

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What about NEPA? It's important to know!

... here's how it looks



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NEPA Picture for CROP Landscape

<u>All NF lands</u>: 99% of 5-yr total = (265.563 mmbf; includes gT as mmbf)



	mmbf	% of total
Approved	105.396	40%
In process	96.058	35%
Just started	0	0%
Not started	66.84	25%



75% of CROP resource offering either NEPA approved or in-process



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... but story best told on agency-by-agency basis.

Let's look at the De Soto NF as an example . . .



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NEPA Risk Rating

1	2	3	4	5
Lowest	Low	Medium	High	Highest

For low risk rating, 3 key desired attributes:

- ✓ Volume *approved* in first 2 years, followed by *in-process*.
- Consistency in supply; no dramatic gaps from year to year (eg: *approved/not started/in-process*).
- ✓ Overall no major emphasis on *just started* or *not started*.



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NEPA Phase

<u>De Soto NF</u>: Total 5-yr volume (128.436 mmbf; includes gT as mmbf)



	mmbf	% of total
Approved	29	23%
In process	44.936	35%
Just started	0	0%
Not started	54.5	42%





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NEPA Risk Rating

Agencies: Ranger Districts in the <u>De Soto NF</u>

(includes gT as mmbt)	1 Lowest	2 Low	3 Medium	4 High	5 Highest	Comments
De Soto (55.936 mmbf)					~	72% of 5-yr volume not started in NEPA process
Chickasawhay (72.5 mmbf)			✓			80% approved or in process years 1 - 4



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<u>NEPA Phase</u>

De Soto RD: (55.936 mmbf; includes gT as mmbf)

	mmbf	% of total
Approved	0	0%
In process	15.936	28%
Just started	0	0%
Not started	40	72%

HEPA Process: De Soto NF De Soto RD (5-yr: 55.936 mmbf)

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not started

just started in process approved

NEPA Phase

<u>Chickasawhay RD</u>: (72.5 mmbf; includes gT as mmbf)

	mmbf	% of total
Approved	29	40%
In process	29	40%
Just started	0	0%
Not started	14.5	20%

NEPA Process: De Soto NF Chickasawhay RD (5-yr: 72.5 mmbf)





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not started

」 just started □ in process ■ approved

What about road access to supply? No problem here . . .

Agency	5-yr total volume mmbf	Affected by No Current Road Access	
Agency	(includes gT as mmbf)	% of total volume affected	species affected
Delta NF	15	0%	none
Homochitto NF	59.058	0%	none
De Soto NF	128.4365	0%	none
Bienville NF	62.8	0%	none
MS DWF & P	1.269	0%	none
Total	266.5635	0%	

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Conclusions for Mississippi CROP

Opportunity in the making!...

➢ Excluding Katrina-downed material, annual volumes in the small & large log stratums sufficient to re-open closed milling operations in the region, and establish new small log processing line.

>NEPA risk looks very good for NF projections, but . . .

➢ More levelization & coordination between public agencies from year to year required to invite investor interest.

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Conclusions for Mississippi CROP

Opportunity in the making!...

For Katrina-downed material, annual volumes in biomass, small & large log stratums sufficient to:

Construct new biomass & solid wood processing facilities in the CROP landscape.

Create new markets for 'Hurricane Pine' (blue stain pine) product. Demand already there, but nation-wide marketing campaign needed to standardize new characterwood grade.

But, obstacles are no light matter . . .

Access to Katrina-downed material difficult as it is primarily located on private lands, and federal funding to help clean-up efforts on private lands returned to Congress in December 2006!

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