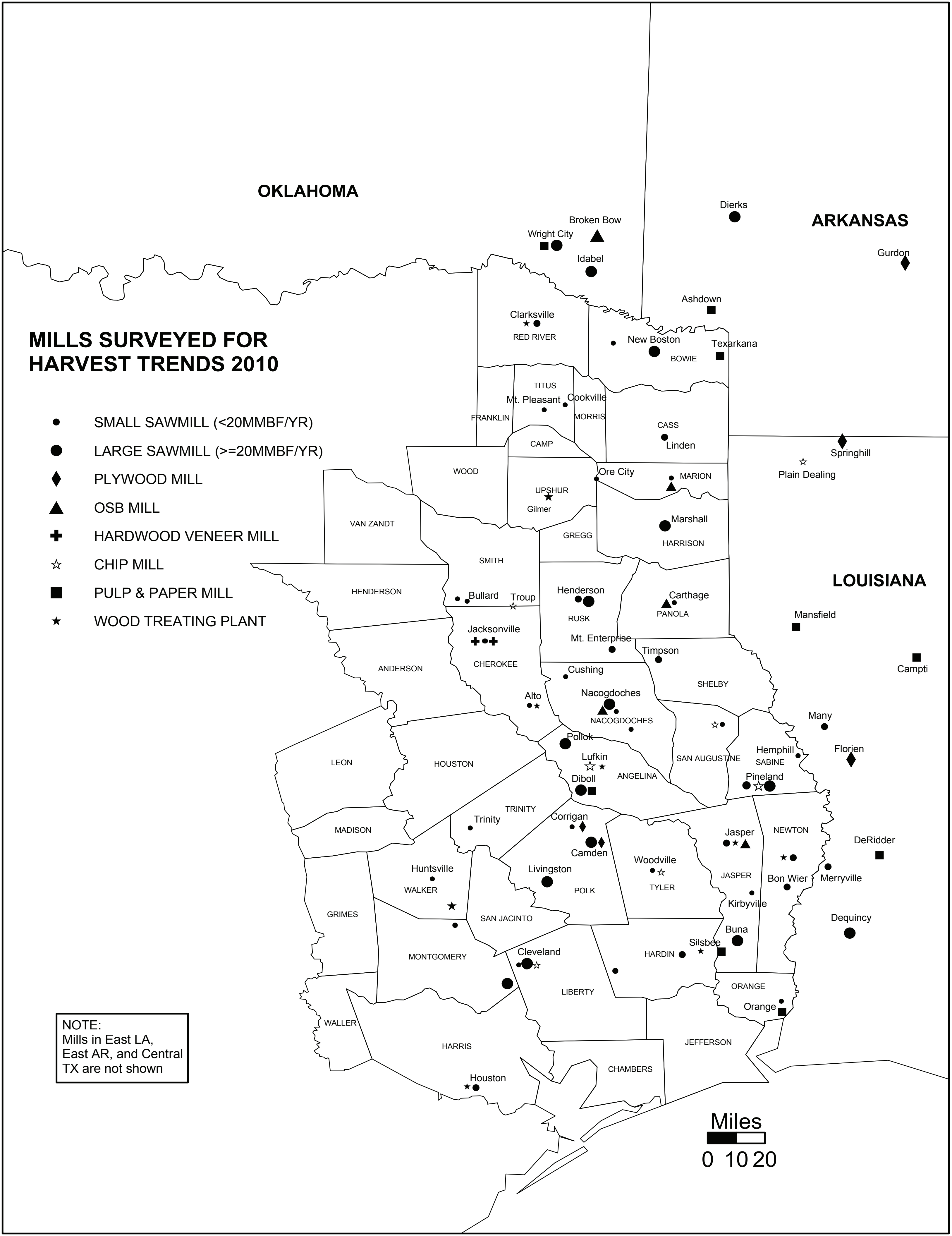
Harvest Trends 2010

September 2011

TEXAS FOREST SERVICE

The Texas A&M University System


MILLS SURVEYED FOR HARVEST TRENDS 2010
SMALL SAWMILL (<20MMBF/YR)
LARGE SAWMILL (>=20MMBF/YR)
PLYWOOD MILL
OSB MILL
HARDWOOD VENEER MILL
CHIP MILL
PULP & PAPER MILL
WOOD TREATING PLANT
NOTE:
Mills in East LA, East AR, and Central TX are not shown
OKLAHOMA
ARKANSAS
LOUISIANA
Broken Bow
Wright City
Idabel
Dierks
Gurdon
Ashdown
Texarkana
New Boston
BOWIE
Clarksville
RED RIVER
TITUS
Mt. Pleasant
Cookville
FRANKLIN
MORRIS
CASS
Linden
CAMP
WOOD
UPSHUR
Gilmer
Ore City
MARION
Springhill
Plain Dealing
VAN ZANDT
GREGG
Marshall
HARRISON
SMITH
HENDERSON
Bullard
Troup
Henderson
RUSK
Carthage
PANOLA
Mansfield
Jacksonville
CHEROKEE
Mt. Enterprise
Timpson
ANDERSON
Cushing
SHELBY
Campti
Nacogdoches
NACOGDOCHES
Alto
Many
Pollok
SAN AUGUSTINE
Hemphill
SABINE
Florien
LEON
HOUSTON
Lufkin
ANGELINA
Diboll
Pineland
TRINITY
Trinity
Corrigan
MADISON
Jasper
NEWTON
DeRidder
Camden
Woodville
TYLER
Huntsville
WALKER
Livingston
POLK
JASPER
Bon Wier
Merryville
Kirbyville
GRIMES
SAN JACINTO
Dequincy
Buna
Silsbee
HARDIN
MONTGOMERY
Cleveland
LIBERTY
ORANGE
Orange
WALLER
HARRIS
JEFFERSON
CHAMBERS
Houston
Miles
0 10 20

Texas Forest Resource

Harvest Trends 2010

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September 2011

HIGHLIGHTS

Texas Forest Resource Harvest Trends 2010

2010 TIMBER REMOVAL

♦ Total growing stock timber removal was 476.1 million cubic feet in 2010, a slight increase (1.6 percent) from last year.

- Pine removal was 385.9 million cubic feet, up less than 1 percent from last year.
- Hardwood removal was up 4.6 percent to 90.3 million cubic feet.

♦ Harvest of timber for industrial use in the production of wood products was 490.6 million cubic feet.

- 401.2 million cubic feet of pine were harvested for industrial consumption.
- 89.4 million cubic feet of hardwood were harvested for industrial consumption.

♦ Stumpage value increased 19.2 percent to $256.2 million, and delivered value was up 11.4 percent to $551.2 million.

♦ Harvest of sawlogs decreased 8.5 percent from last year to 1.1 billion board feet.

♦ Harvest of wood for veneer and structural panel production increased 6.2 percent to 97.2 million cubic feet from a year ago.

♦ Pulpwood harvest increased 11.7 percent to 2.6 million cords.

♦ Total timber volume imported from other states was 89.6 million cubic feet while the total volume exported was 60.0 million cubic feet. The net import was 29.7 million cubic feet in 2010.

PRIMARY FOREST PRODUCTS

♦ Production of primary wood products in 2010 included:

- 1.3 billion board feet of lumber, a drop of 5.8 percent from last year.
- 1.9 billion square feet (3/8-inch basis) of structural panel products, a decrease of 3.9 percent from 2009.
- 2.1 million tons of paperboard, up 4.1 percent from 2009.

MILL AND LOGGING RESIDUES

♦ Total production of mill residue in 2010 was 5.4 million green tons

♦ Total production of logging residue in 2010 was 2.6 million green tons.

Harvest Trends 2010

INTRODUCTION

Forests are vital economic and environmental assets in East Texas. The wood-based industry employed more than 63,000 people in 2009[1] and was one of the top 10 manufacturing sectors in the state[2]. In 25 of 43 East Texas counties, the forest sector was one of the two largest manufacturing employers. The value of harvested timber ranked seventh in 2009 among Texas' top agricultural commodities, behind cattle, broilers, greenhouse and nursery, cotton, milk, and corn[3].

To gather the most current information on the status of this valuable resource, Texas Forest Service conducts an annual survey of the state's primary forest products industry. This 45th annual report provides information on the volume and value of timber harvested in East Texas during 2010, and reports the production of primary wood products, logging residue, and mill residue. Data on forest management activities is also presented.

Information for this report was provided by 102 mills in Texas and 26 mills in surrounding states. Texas Forest Service appreciates the cooperation of these companies, without which this report would not be possible.

2010 ECONOMIC CONDITIONS

The United States economy showed mixed signs of recovery in 2010. The real Gross Domestic Growth (GDP) grew 3.0 percent, the highest annual growth rate since 2006[4], mainly due to accelerating investment in business and inventories, stronger consumer and federal government spending, and significant increase in exports. U.S. corporate profits grew 36.8 percent in 2010 and hit an all-time high. However, the unemployment rate remained high at 9.6 percent on average. GDP growth was not high enough to sustain moderate increase in employment. Businesses were reluctant to increase hiring due to uncertainties in public policies and recovery of the U.S. economy.

The Federal Reserve announced in December that it would buy $600 billion of long-term U.S. Treasury securities over eight months into 2011 and reinvest an additional $200 billion to $300 billion in Treasuries with the proceed from its earlier investments, aiming at stimulating spending and investments. Meanwhile, the federal funds rate has remained constant at 1/4 percent since 2008[5].

The Consumer Price Index (CPI), the most closely watched indicator for U.S. inflation, increased to 1.6 percent in 2010, mainly driven by higher energy prices. Gasoline prices increased 14 percent and fuel oil index rose 17 percent over the year[6].

The U.S. housing market remained sluggish. Nationwide housing starts rose 6.1 percent to 588,000 units in 2010[7]. Single-family housing starts increased 5.8 percent to 471,000 units, accounting for around 80 percent of all housing starts. Multi-family housing starts rose 7.2 percent. National residential housing permits, the best indicator of future housing starts activity, rose slightly (3.7%) to 605,000 units in 2010. The gain was mainly due to the 10 percent increase in multifamily permits. Single-family building permits remained roughly the same as 2009.

Housing affordability continued to soar to a record high[8]. The sale price of existing homes averaged $222,000 in 2010, slightly higher than 2009. Mortgage rates dropped to historic lows in 2010. The national monthly average 30-year fixed mortgage rate started at 5.03 percent in January, dipped to an all-time low of 4.23 percent in October, and rebounded slightly back to 4.69 percent in December[9].

Existing home sales had a strong run in early spring fueled by the extended federal homebuyer tax credit incentive. Sales plunged 26 percent from June to July after the incentive expired and resumed to an annual rate of 4.9 million units by the end of 2010, still 3.9 percent lower than 2009. Distressed homes accounted for more than 30 percent of sales. Total housing inventory fell to 3.6 million by the end of 2010, representing an 8.1-month supply. Despite record-high housing affordability and low mortgage rates, home sales were not as strong as expected mostly because consumers were concerned about home prices falling further, their job status, qualification for a loan, and the status and trend of the general economy.

The Texas economy continued to outperform the economy of the rest of the U.S. Real Gross State Product (GSP) grew by 2.8% in 2010[10], gaining 230,800 jobs. Texas added jobs in most sectors, including construction, manufacturing, mining and logging, leisure and hospitality, financial activities, professional and business services, educational and health services and government. Although it still fared better than the national average, the unemployment rate in Texas increased to 8.3 percent in 2010. The total number of residential building permits in Texas in-

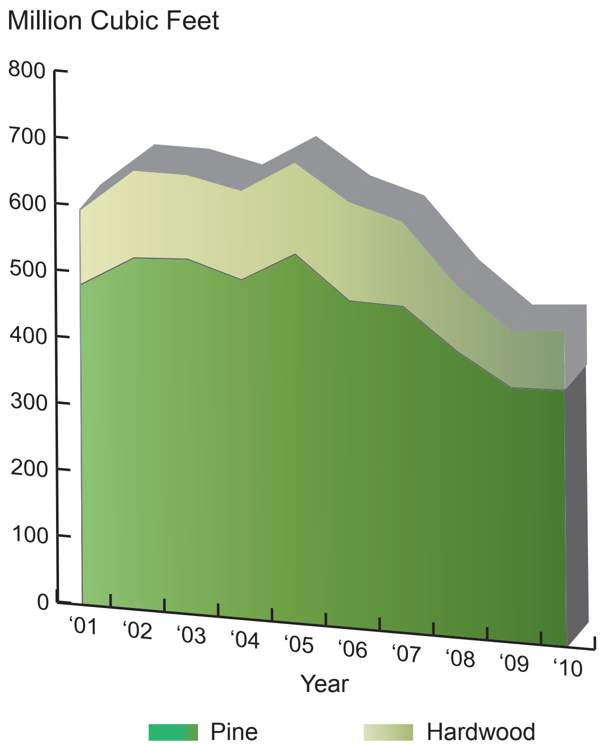


Figure 1. Total Timber Removal, 2001-2010

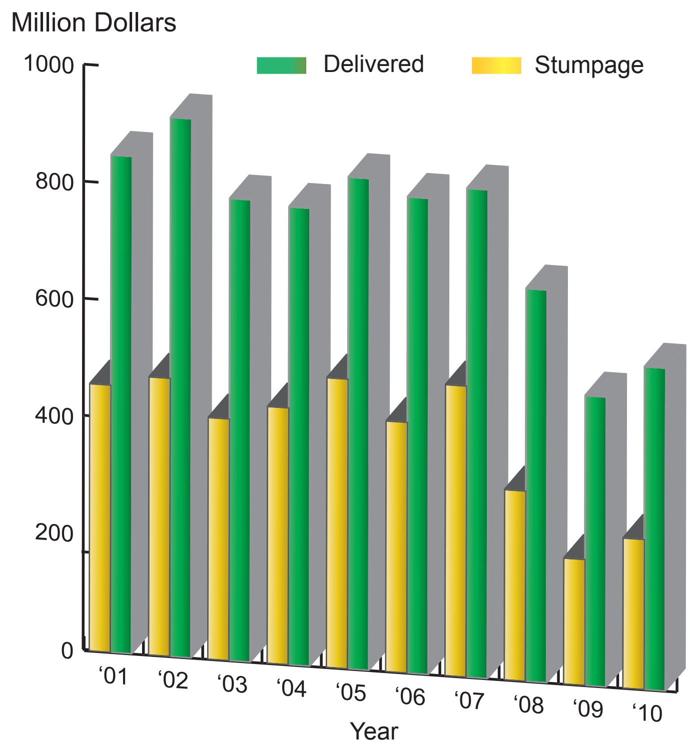


Figure 2. Value of Timber Harvest, 2001-2010

creased 4.8 percent in 2010 to 89,674 units. Single-family housing building permits remained at roughly the same level as last year while multi-family housing building permits increased 23.8 percent to 38,879 units in 2010[11].

U.S. softwood lumber production increased 6.4 percent in 2010 to 24.9 billion board feet (bbf), still 38.2 percent below the recent high of 40.3 bbf in 2005. Lumber production in the U.S. South accounted for 49.2 percent of the total, or 12.3 bbf, a 3.6 percent increase from 2009. Western production increased 9.2 percent to 11.4 bbf in 2010[12].

The 2010 structural panels production in the U.S. rebounded 6.7 percent from the depressed 2009 level (lowest level since 1984) to 19.4 billion square feet (bsf) (3/8-inch basis)[12], including 9.1 bsf of plywood and 10.3 bsf of oriented strand board (OSB). Following the recent trend, southern OSB production continued to increase while southern plywood production declined. Southern OSB production increased 6.5 percent to 8.3 bsf in 2010. Southern plywood production dropped 1.4 percent to 5.7 bsf.

Lumber and panel prices rose dramatically from January 2010 and reached a four-year record high in late April. However, the price surge didn't last long. Starting in May, lumber and panel prices fell as sharply as they had risen at the beginning of the year. Prices leveled off in the fourth quarter and ended modestly higher than last year. The spring price spike was mainly driven by a supply shortage due to rain-induced log shortages, prolonged mill curtailment, and thin inventory in the supply chain. Meanwhile, slightly improved domestic demand due to the federal home buyer tax credit and soaring demand from overseas also contributed to the price surge. The sharp increase in lumber prices led to temporary reduced export tax rates on lumber from Canada to the U.S. for the first time since 2006.

The average annual Random Lengths Framing Lumber Composite Price increased 27.9 percent, from $222 per thousand board feet (mbf) in 2009 to $284 per mbf in 2010[12]. The average annual Random Lengths Structural Panel Composite Price increased 25.1 percent to $324 per thousand square feet (msf) in 2010[9].

U.S. paper and paperboard production rebounded from the recession-induced lows reached in 2009 (the lowest level since 1988). The total production of paper and paperboard was estimated to be 82.5 million short tons in 2010[13].

STUMPAGE PRICES

According to Texas Timber Price Trends bimonthly timber market report, average annual pine sawtimber price increased 11.1 percent to $200.60 per mbf, Doyle scale, in 2010, from the 2009 average annual price of $180.62 per mbf. The average annual mixed hardwood sawtimber price increased 52.5 percent from its 2009 level to $270.49 per mbf in 2010. Pine pulpwood price increased 27.3 percent to $21.99 per cord from its 2009 price. Mixed hardwood pulpwood price increased 72.4 percent to $31.75 per cord in 2010. Table 6 provides historic data on stumpage prices.

TIMBER REMOVALS

Growing Stock Removals

Total removals of growing stock in East Texas in 2010, including pine and hardwood, increased 1.6 percent from the previous year (Figure 1). The total volume of growing stock removed from the 43-county region was 476.1 million cubic feet, compared to 468.8 million cubic feet a year earlier. Included in the total growing stock removals are timber harvested for industrial use and an estimate of logging residue. Growing stock removals are based on the latest East Texas Harvest and Utilization Study by the USDA Forest Service.

By species group, growing stock removals in 2010 were comprised of 385.9 million cubic feet of pine and 90.3 million cubic feet of hardwood. Pine removals were up less than 1 percent and hardwood removals were up 4.6 percent from a year earlier. Figure 3 and Table 14 illustrate the harvest volume by species group by year.

Industrial Roundwood Harvest

Industrial roundwood harvest in Texas, the portion of the total removals that was subsequently utilized in the manufacture of wood products, totaled 401.2 and 89.4 million cubic feet for pine and hardwood, respectively. Pine industrial roundwood harvest was up 1.2 percent, and hardwood roundwood harvest was up 7.1 percent from a year earlier. The combined harvest increased 2.2 percent to 490.6 million cubic feet. Ninety-three percent of the industrial roundwood was from growing stock and 7 percent of the industrial roundwood was from non-growing stock (Table 13).

Table 1 lists the harvest of pine and hardwood by county for 2010. Top timber producing counties included Jasper, Tyler, Polk, Hardin, and San Augustine.

Figure 4 on the next page illustrates the intensity of timber harvest expressed in cubic feet of harvest per acre of timberland. San Augustine, Jasper, Tyler, Angelina, and Sabine counties had the highest relative timber harvesting intensity.

Value of Timber Harvest

Stumpage value of East Texas timber harvest increased 19.2 percent in 2010 to $256.2 million (Figure 2). Although an increase from a year earlier, this stumpage value is considerably lower than that observed in the years prior to the recent recession. The delivered value was up 11.4 percent to $551.2 million. Pine timber accounted for 79 percent of the total stumpage value. Figure 3 depicts the value of harvest by product. Table 7 lists stumpage and delivered value by product category.

Sawlogs

Harvest of sawlogs for lumber production decreased 8.5 percent to 1.1 billion board feet, which accounted for 37.2 percent of the 2010 total timber harvest. The pine sawlog cut totaled 987 million board feet, down 3.6 percent. Hardwood sawlog harvest was down 33.4 percent to 136 million board feet. Jasper, Angelina, Nacogdoches, Hardin, and Cherokee counties were the top producers of sawlogs. Table 2 lists sawlog harvest by county.

Veneer and Panel Roundwood

Harvest of timber for the production of structural panels, including plywood, OSB and hardwood veneer, was 97.2 million cubic feet in 2010, a 6.2 percent increase from a year earlier. The timber harvest for structural panels was 19.8 percent of the total timber harvest. Almost all of the veneer and panel roundwood was pine. Polk, Angelina, Cherokee, Nacogdoches, and Sabine counties were the top producers of veneer and panel roundwood. Table 3 lists the harvest of veneer and panel roundwood by county.

Pulpwood

Harvest of timber for pulp and paper products in Texas increased 11.7 percent in 2010 to 2.6 million cords. Roundwood pulpwood harvest accounted for 42.4 percent of the total timber harvest. Pine pulpwood made up 68.0 percent of the total pulpwood production. Tyler, Jasper, Hardin, San Augustine, and Cass counties were the top producers of pulpwood. Table 4 lists the roundwood pulpwood harvest by county.

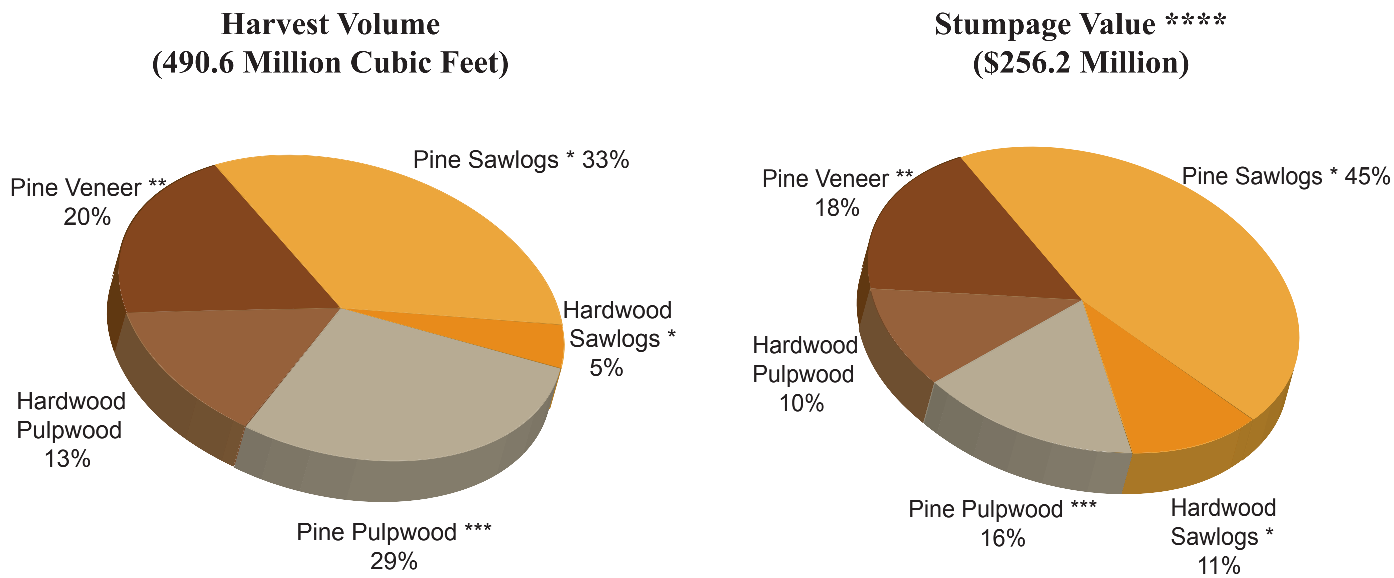
Other Roundwood

Other roundwood harvest included posts, poles and pilings that totaled 2.7 million cubic feet in 2010. Table 5 lists harvest of these products by county.

Import-Export Trends

Texas imported more timber from surrounding states than exported to surrounding states in 2010. Exports of roundwood from Texas were 60.0 million cubic feet, while imports totaled 89.6 million cubic feet. The net import of roundwood was 29.7 million cubic feet. Table 8 details the interstate movement of roundwood.

Texas mills utilized 87.8 percent of the timber harvested in the state. The remainder was processed mainly by mills in Arkansas, Louisiana, and Oklahoma. Details are listed in Table 8.



* Includes chip-n-saw
** Includes panel roundwood (pulpwood sized material chipped for panel production)
*** Includes posts, pole and pilings
**** Products with stumpage value less than 1% of total are not included

Figure 3. Volume and Value of Timber Harvest, 2010

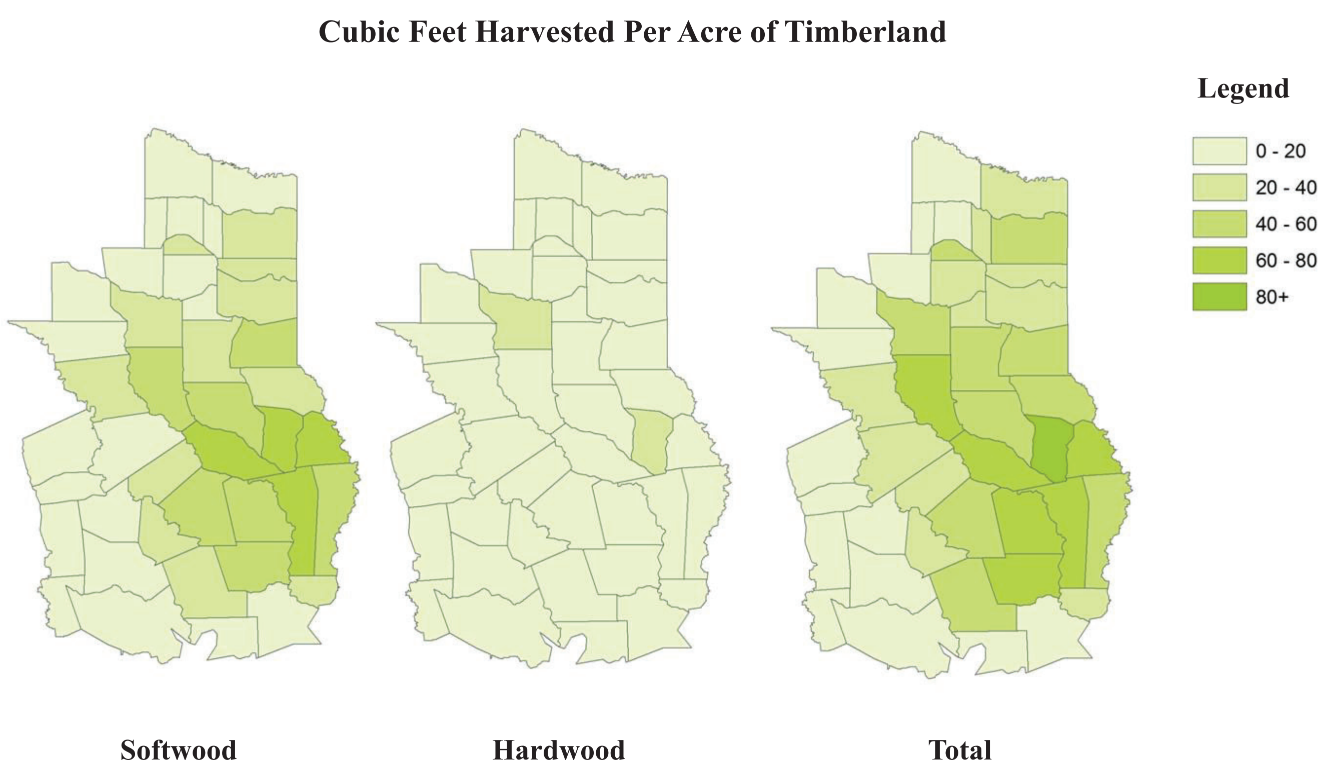


Figure 4. Intensity of Timber Harvest by County, 2010

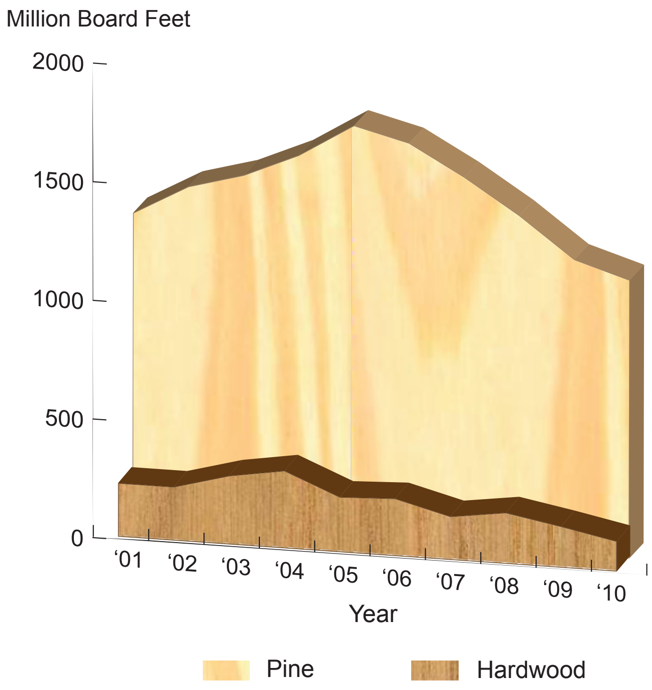


Figure 5. Texas Lumber Production, 2001-2010

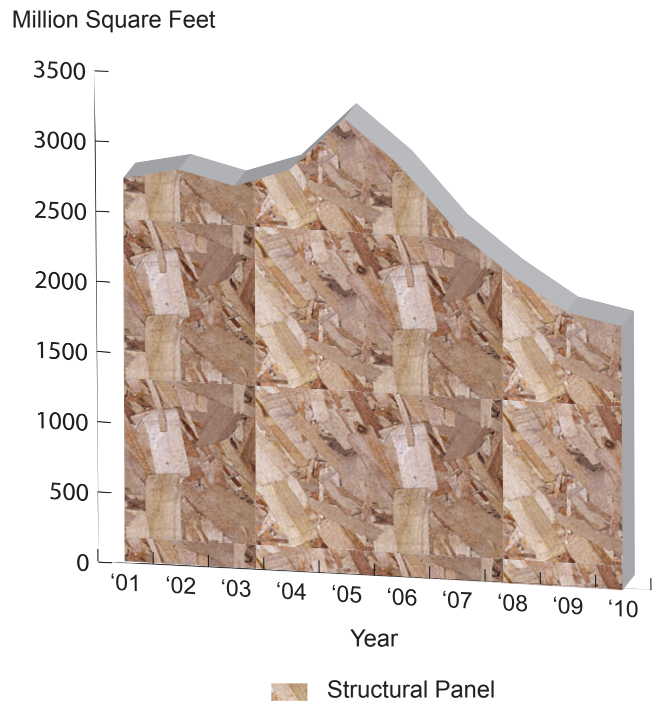


Figure 6. Texas Structural Panel Production, 2001-2010

PRODUCTION OF FOREST PRODUCTS

Lumber

Texas sawmills produced 1.3 billion board feet of lumber in 2010, a decrease of 5.8 percent from a year earlier. Production of pine lumber decreased 4.0 percent to 1.2 billion board feet and hardwood lumber production decreased 18.7 percent to 139.4 million board feet. Table 9 and Figure 5 present a 10-year trend in lumber production.

Structural Panel Products

Production of structural panels, including plywood and OSB, was down 3.9 percent to 1.9 billion square feet (3/8-inch basis) in 2010. Table 9 and Figure 6 show the recent trend in structural panel output.

Paper Products

Production of paperboard totaled 2.1 million tons in 2010, up 4.1 percent from a year earlier. There has not been any major paper production in Texas since 2003. Table 10 and Figure 7 summarize recent trends in paper product output.

Treated Wood Products

The total volume of wood treated by Texas wood treaters was 39.1 million cubic feet in 2010, down 15.4 percent from a year earlier. Among major treated products, lumber accounted for 56.5 percent of the total volume, crossties accounted for 18.8 percent, and utility poles and fence posts accounted for 7.2 percent and 3.3 percent, respectively. Table 11 contains treated volume by product for the past two years.

Primary Mill Residue

Total mill residue, including chips, sawdust, shavings, and bark in primary mills such as sawmills, panel mills and chip mills in 2010 was 5.4 million green tons, based on updated residue product ratios. This was 3.6 percent lower than a year earlier (Table 12). Eighty-three percent of the mill residue was from pine species and 17 percent was from hardwood species. Chips accounted for 49.6 percent of mill residue, followed by bark (31.8 percent), sawdust (13.1 percent), and shavings (5.5 percent) (Figure 8).

Logging Residue

Types of logging residue include stumps, tops, limbs and unutilized cull trees. Total logging residue produced in 2010 was 2.6 million green tons. Logging residue comes from both growing stock and non-growing stock. In 2010, 25.1 percent of the logging residue was from growing stock, and 74.9 percent was from non-growing stock. Sixty-seven percent of the residue was from pine and 33 percent was from hardwood (Table 13, Figure 9).

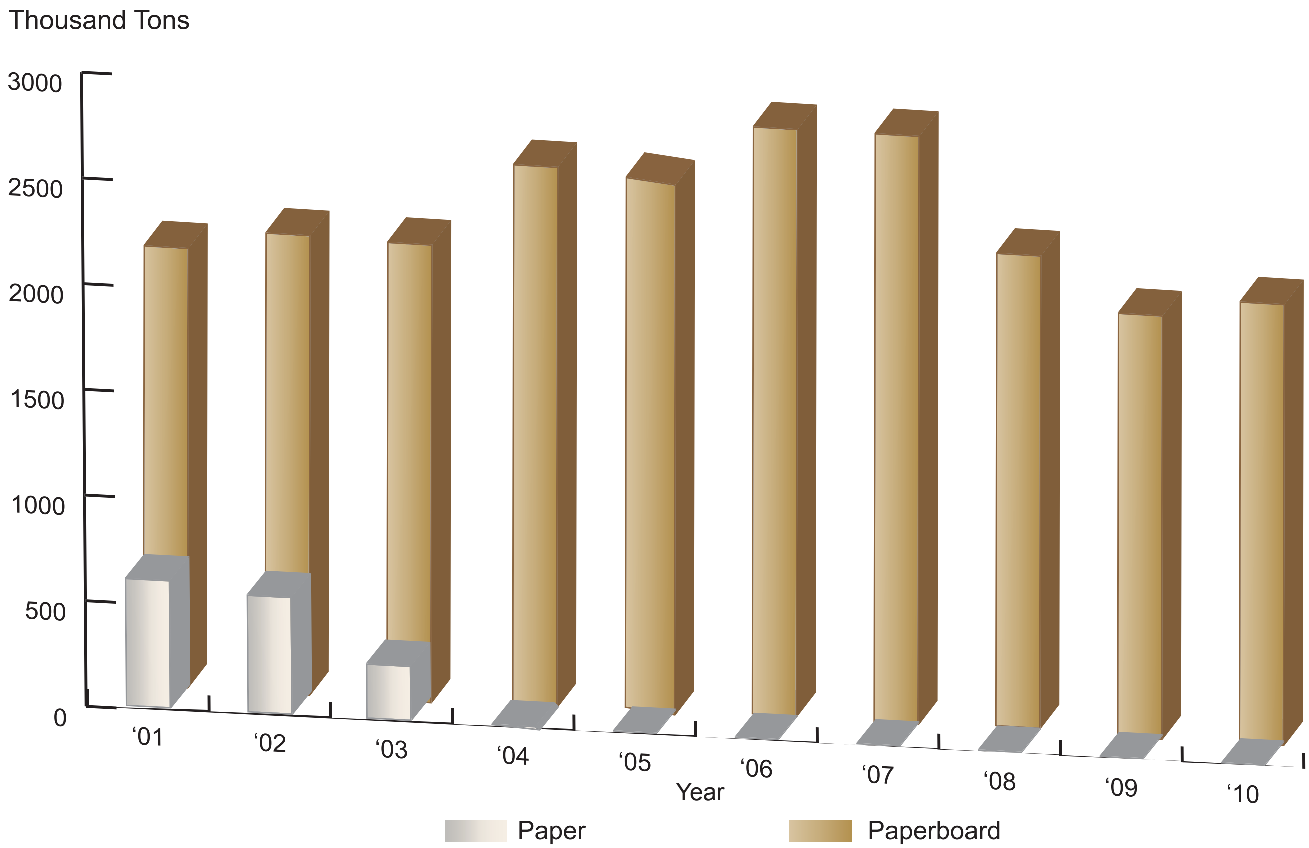


Figure 7. Texas Paper Production, 2001-2010

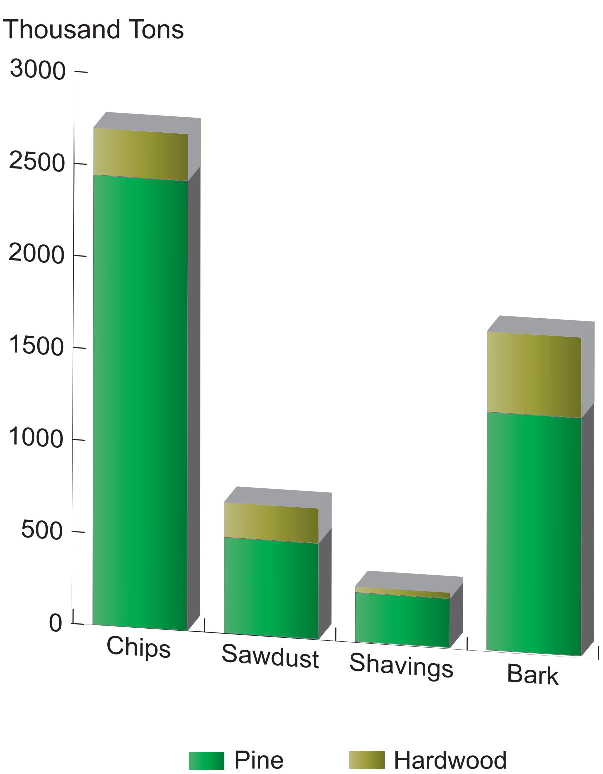


Figure 8. Texas Primary Mill Residue, 2010

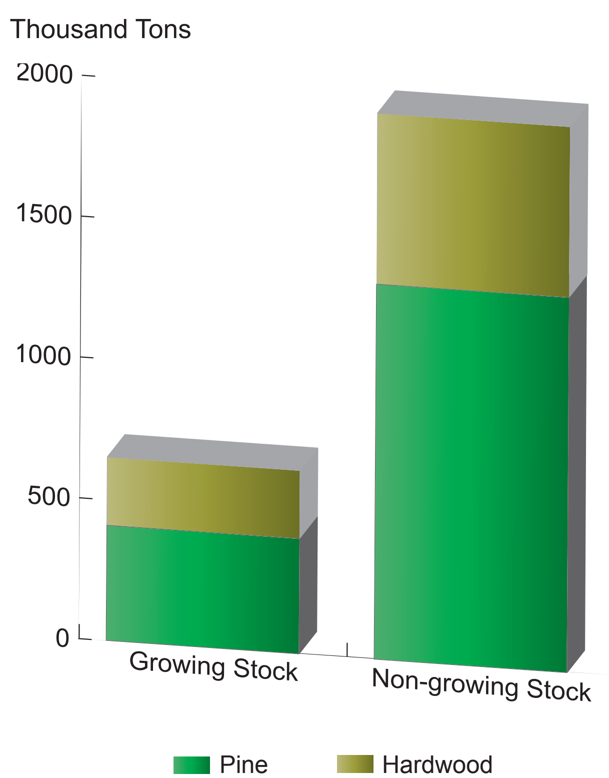


Figure 9. Texas Logging Residue, 2010

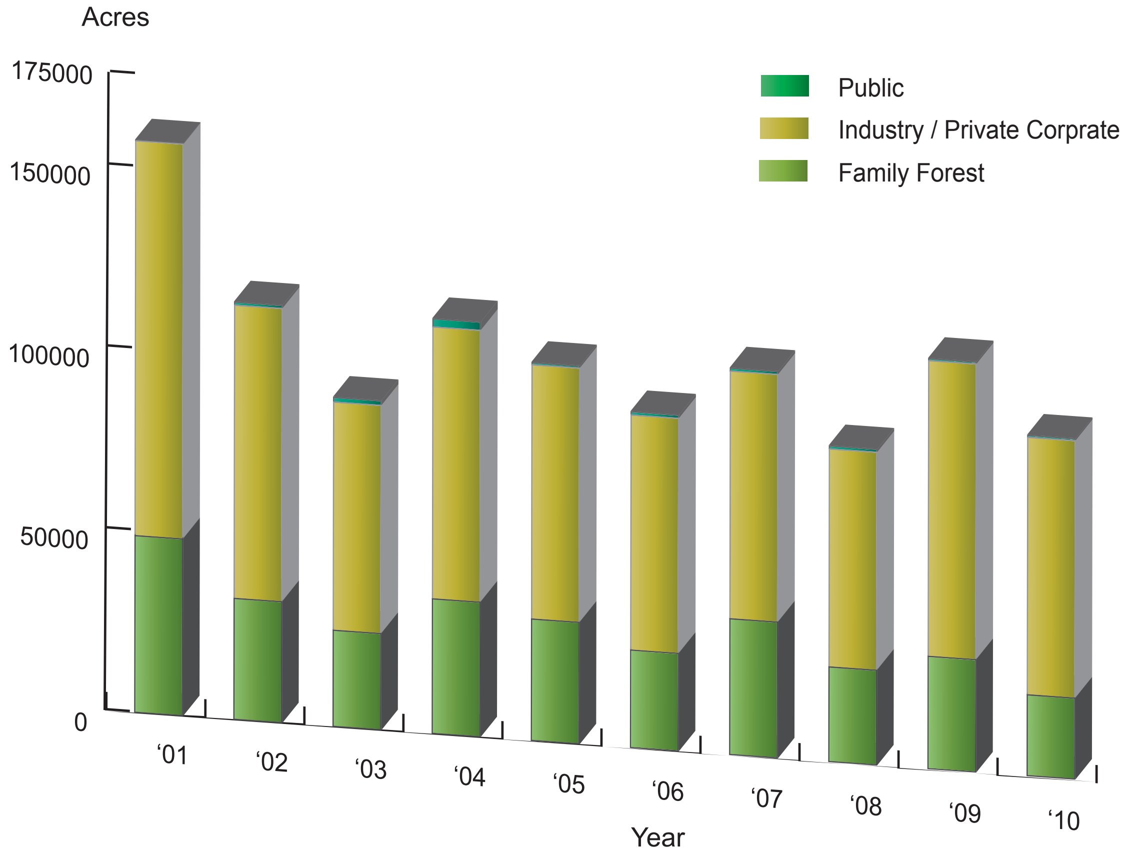


Figure 10. Reforestation Acreage by Ownership in Texas, 2001-2010

REFORESTATION

Accomplishments in reforestation by funding source and ownership are presented in Table 15. A total of 93,306 acres was planted during the winter 2009/spring 2010 planting season. This was a 17 percent decrease from the previous year. Industrial landowners planted 70,577 acres, down 12.9 percent from the previous year. Family forest owners planted 22,174 acres. Public landowners planted 555 acres in the 2010 planting season. Family forest owners received $1.57 million in cost share assistance for reforestation through federal cost share programs.

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[3]Texas Agricultural Statistics 2009 Bulletin (http://www.nass.usda.gov/Statistics_by_State/Texas/Publications/Annual_Statistical_Bulletin/bull2009.pdf)

[4]http://www.bea.gov/national/index.htm

[5]http://www.federalreserve.gov/monetarypolicy/fomccalendars.htm

[6]http://www.bls.gov/cpi/

[7]http://www.census.gov/

[8]http://www.realtor.org/research/research/housinginx

[9]http://www.freddiemac.com/pmms/pmms30.htm

[10]U.S. Bureau of Economic Analysis. 2011. Real GDP by state (chained dollars).

[11]http://recenter.tamu.edu/data

[12]Random Lengths, Year Book, 2010

[13]http://www.statmill.org/

Table 1. Total Industrial Timber Harvest Volume and Value by County in Texas, 2010

County	Volume Harvested			Value of Harvest	
	Pine	Hardwood	Total	Stumpage Value	Delivered Value
	– – – – – – – – – – – cubic feet – – – – – – – – – – –			– – – – – thousand dollars – – – – –	
Anderson	10,147,228	2,306,701	12,453,929	6,682	14,271
Angelina	23,068,946	2,279,572	25,348,518	14,666	29,659
Bowie	4,110,374	3,078,971	7,189,345	4,266	8,774
Camp	643,524	583,199	1,226,723	545	1,320
Cass	13,312,665	5,685,679	18,998,344	8,909	20,643
Chambers	320,686	0	320,686	261	442
Cherokee	19,805,567	5,149,668	24,955,235	14,237	29,586
Franklin	183,672	571,304	754,976	475	983
Gregg	498,993	1,354,935	1,853,928	1,743	3,020
Grimes	344,502	0	344,502	271	464
Hardin	24,935,321	3,628,676	28,563,997	12,690	29,685
Harris	1,546,767	36,575	1,583,342	1,205	2,099
Harrison	8,794,538	2,333,770	11,128,308	6,086	12,830
Henderson	937,701	705,510	1,643,211	1,246	2,299
Houston	7,385,738	584,554	7,970,292	4,807	9,472
Jasper	39,000,491	1,880,334	40,880,825	19,684	43,613
Jefferson	311,303	0	311,303	189	368
Leon	451,186	167,908	619,094	389	762
Liberty	13,565,217	6,259,050	19,824,267	9,978	22,118
Madison	18,156	36,560	54,716	24	59
Marion	5,161,434	2,732,546	7,893,980	4,893	9,768
Montgomery	4,130,615	204,320	4,334,935	3,068	5,515
Morris	831,286	722,976	1,554,262	778	1,772
Nacogdoches	17,546,548	2,621,262	20,167,810	12,830	24,809
Newton	22,906,954	2,141,497	25,048,451	11,283	26,140
Orange	2,378,310	22,304	2,400,614	1,310	2,708
Panola	14,967,970	2,755,438	17,723,408	9,874	20,457
Polk	29,524,749	753,256	30,278,005	15,722	33,205
Red River	3,854,780	2,084,424	5,939,204	3,917	7,647
Rusk	8,991,138	3,289,207	12,280,345	7,602	15,181
Sabine	16,276,731	1,357,053	17,633,784	8,942	19,229
San Augustine	19,452,220	8,328,611	27,780,831	13,302	30,261
San Jacinto	5,867,261	25,323	5,892,584	4,322	7,614
Shelby	12,823,607	5,013,700	17,837,307	7,898	18,851
Smith	7,892,134	6,659,247	14,551,381	6,926	16,266
Titus	227,546	531,057	758,603	721	1,240
Trinity	13,419,974	190,382	13,610,356	6,010	13,937
Tyler	28,693,901	6,580,699	35,274,600	15,358	36,585
Upshur	2,481,520	2,531,580	5,013,100	2,842	6,073
Van Zandt	72,995	102,544	175,539	138	256
Walker	6,280,281	262,031	6,542,312	4,484	8,167
Waller	136,695	0	136,695	112	189
Wood	2,132,980	381,801	2,514,781	1,003	2,536
Other Counties	5,769,403	3,451,138	9,220,541	4,492	10,358
Total Production	401,203,607	89,385,362	490,588,969	256,178	551,232

Table 2. Sawlog Harvest by County in Texas, 2010

County	Pine	Hardwood	Total
	–––––––––MBF[1]–––––––––		
Anderson	19,984	6,513	26,497
Angelina	66,453	10,042	76,495
Bowie	15,619	3,949	19,568
Camp	1,499	31	1,530
Cass	28,621	3,532	32,153
Chambers	1,821	0	1,821
Cherokee	36,323	21,482	57,805
Franklin	470	1,177	1,647
Gregg	1,858	6,822	8,680
Grimes	1,137	0	1,137
Hardin	59,692	1,511	61,203
Harris	6,073	2	6,075
Harrison	25,964	3,284	29,248
Henderson	3,325	2,629	5,954
Houston	17,020	2,399	19,419
Jasper	103,634	220	103,854
Jefferson	484	0	484
Leon	975	227	1,202
Liberty	24,815	5,289	30,104
Madison	27	0	27
Marion	20,483	4,299	24,782
Montgomery	15,687	0	15,687
Morris	1,425	1,041	2,466
Nacogdoches	55,433	9,121	64,554
Newton	51,581	236	51,817
Orange	7,247	133	7,380
Panola	45,702	2,441	48,143
Polk	54,541	319	54,860
Red River	12,115	7,223	19,338
Rusk	25,504	11,719	37,223
Sabine	50,428	199	50,627
San Augustine	55,765	1,970	57,735
San Jacinto	25,407	151	25,558
Shelby	25,308	709	26,017
Smith	8,033	10,478	18,511
Titus	979	2,724	3,703
Trinity	26,110	1,130	27,240
Tyler	54,435	257	54,692
Upshur	5,564	5,015	10,579
Van Zandt	127	0	127
Walker	22,142	243	22,385
Waller	753	0	753
Wood	2,289	504	2,793
Other Counties	3,921	6,824	10,745
Total Production	986,773	135,845	1,122,618

[1]International ¼-inch rule.

Table 3. Veneer and Panel Roundwood Harvest by County in Texas, 2010

County	Pine	Hardwood	Total
	‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒	cubic feet	‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒ ‒
Anderson	5,072,051	82,784	5,154,835
Angelina	10,422,091	0	10,422,091
Bowie	466,097	0	466,097
Camp	1,944	0	1,944
Cass	10,856	0	10,856
Chambers	25,257	0	25,257
Cherokee	7,424,115	41,278	7,465,393
Franklin	0	0	0
Gregg	113,571	0	113,571
Grimes	155,090	0	155,090
Hardin	984,210	0	984,210
Harris	484,244	0	484,244
Harrison	1,578,381	0	1,578,381
Henderson	174,513	82,784	257,297
Houston	4,198,464	0	4,198,464
Jasper	4,379,522	0	4,379,522
Jefferson	127,172	0	127,172
Leon	267,865	0	267,865
Liberty	3,333,385	0	3,333,385
Madison	6,569	0	6,569
Marion	15,673	0	15,673
Montgomery	1,462,435	0	1,462,435
Morris	9,007	0	9,007
Nacogdoches	5,878,200	82,784	5,960,984
Newton	3,685,357	0	3,685,357
Orange	35,899	0	35,899
Panola	4,459,323	0	4,459,323
Polk	10,527,607	0	10,527,607
Red River	1,500,923	0	1,500,923
Rusk	3,842,745	0	3,842,745
Sabine	5,384,570	0	5,384,570
San Augustine	3,847,786	0	3,847,786
San Jacinto	1,684,616	0	1,684,616
Shelby	2,511,856	0	2,511,856
Smith	1,012,383	41,278	1,053,661
Titus	0	0	0
Trinity	3,715,141	0	3,715,141
Tyler	4,960,817	0	4,960,817
Upshur	64,445	0	64,445
Van Zandt	2,189	82,784	84,973
Walker	2,509,853	0	2,509,853
Waller	14,470	0	14,470
Wood	139,300	0	139,300
Other Counties	198,593	114,028	312,621
Total Production	96,688,585	527,720	97,216,305

Table 4. Pulpwood Roundwood Harvest by County in Texas, 2010

County	Pine	Hardwood	Total
	– – – – – – – – – – – – – – – cords	– – – – – – – – – – – – – – –	
Anderson	22,623	14,146	36,769
Angelina	21,361	7,444	28,805
Bowie	13,734	30,209	43,943
Camp	4,921	7,225	12,146
Cass	106,945	63,667	170,612
Chambers	3	0	3
Cherokee	77,825	18,823	96,648
Franklin	1,327	4,674	6,001
Gregg	1,040	2,636	3,676
Grimes	63	0	63
Hardin	176,239	42,191	218,430
Harris	964	453	1,417
Harrison	37,129	22,288	59,417
Henderson	2,768	2,273	5,041
Houston	5,288	2,278	7,566
Jasper	217,814	23,043	240,857
Jefferson	33	0	33
Leon	312	1,623	1,935
Liberty	76,660	67,151	143,811
Madison	89	457	546
Marion	22,537	25,145	47,682
Montgomery	1,547	2,554	4,101
Morris	7,300	6,855	14,155
Nacogdoches	30,669	12,611	43,280
Newton	130,642	26,274	156,916
Orange	14,416	0	14,416
Panola	34,462	29,326	63,788
Polk	125,386	8,747	134,133
Red River	4,815	10,914	15,729
Rusk	12,521	16,549	29,070
Sabine	31,858	16,546	48,404
San Augustine	79,184	99,978	179,162
San Jacinto	792	0	792
Shelby	75,270	61,185	136,455
Smith	68,861	60,760	129,621
Titus	850	928	1,778
Trinity	67,562	11	67,573
Tyler	182,748	81,720	264,468
Upshur	18,706	21,132	39,838
Van Zandt	620	247	867
Walker	2,237	2,766	5,003
Waller	2	0	2
Wood	20,033	3,716	23,749
Other Counties	51,609	27,409	79,018
Total Production	1,751,765	825,954	2,577,719

Table 5. Other Roundwood Harvest by County in Texas, 2010[1]

County	Pine	Hardwood	Total
	– – – – – – – – – – – – – – – –	cubic feet	– – – – – – – – – – – – – – – –
Anderson	3,337	0	3,337
Angelina	144,572	0	144,572
Bowie	0	0	0
Camp	0	0	0
Cass	0	0	0
Chambers	0	0	0
Cherokee	189,802	0	189,802
Franklin	0	0	0
Gregg	0	0	0
Grimes	0	0	0
Hardin	0	0	0
Harris	0	0	0
Harrison	0	0	0
Henderson	0	0	0
Houston	0	0	0
Jasper	179,336	0	179,336
Jefferson	103,000	0	103,000
Leon	0	0	0
Liberty	0	0	0
Madison	0	0	0
Marion	0	0	0
Montgomery	0	0	0
Morris	0	0	0
Nacogdoches	198,485	0	198,485
Newton	278,546	0	278,546
Orange	0	0	0
Panola	308,966	0	308,966
Polk	0	0	0
Red River	0	0	0
Rusk	0	0	0
Sabine	137,311	0	137,311
San Augustine	151,144	0	151,144
San Jacinto	0	0	0
Shelby	112,592	0	112,592
Smith	0	0	0
Titus	0	0	0
Trinity	0	0	0
Tyler	106,923	0	106,923
Upshur	0	0	0
Van Zandt	0	0	0
Walker	0	0	0
Waller	0	0	0
Wood	0	0	0
Other Counties	754,992	0	754,992
Total Production	2,669,006	0	2,669,006

[1] Including posts, poles and piling.

Table 6. Timber Stumpage Price in East Texas by Product, 2000-2010

Year	Sawtimber/Veneer		Pulpwood		Pine Chip-N-Saw	Pine Poles
	Pine	Mixed Hardwood	Pine	Mixed Hardwood		
	– – – $/MBF-Doyle – – –		– – – $/cord – – –		$/cord	$/ton
2000	376.57	120.88	19.20	7.97	57.69	54.92
2001	325.14	120.32	12.94	15.11	42.06	55.81
2002	334.86	156.97	12.33	15.67	41.92	66.63
2003	289.30	157.81	14.90	15.85	41.90	68.44
2004	286.42	189.73	19.52	16.90	43.74	77.00
2005	305.58	164.16	17.44	19.69	47.99	77.38
2006	294.82	144.98	17.22	13.22	43.72	76.50
2007	321.40	162.69	32.79	30.09	46.78	59.16
2008	241.71	217.87	25.90	22.31	41.80	54.28
2009	180.62	177.34	17.27	18.42	32.66	57.75
2010	200.60	270.49	21.99	31.75	38.66	55.06

SOURCE: *Texas Timber Price Trends* bi-monthly market report, with pine pole price from *Timber Mart South.*

Table 7. Value of East Texas Timber Harvest, 2010

Product	Unit	Stumpage		Delivered	
		Price[1] ($/unit)	Value (million $)	Price[2] ($/unit)	Value (million $)
PINE					
Sawlogs/Chip-n-Saw	MBF[3]	–	115.9	–	204.9
Sawlogs	MBF[3]	133.72	93.8	224.70	157.7
Chip-n-Saw	MBF[3]	77.32	22.0	165.72	47.2
Veneer/Panel Roundwood	MCF	–	46.0	–	102.7
Veneer Logs	MCF	824.90	*	1,386.22	*
Panel Roundwood	MCF	271.48	*	873.30	*
Pulpwood	cords	21.99	38.5	70.74	123.9
Others	MCF	–	1.9	–	3.5
All pine products			202.3		435.1
HARDWOOD					
Sawlogs	MBF[3]	198.90	27.0	322.81	43.9
Veneer/Panel Roundwood	MCF	–	0.6	–	1.0
Veneer Logs	MCF	1,186.05	0.6	1,924.89	1.0
Panel Roundwood	MCF	396.88	0.0	1,078.63	0.0
Pulpwood	cords	31.75	26.2	86.29	71.3
All hardwood products			53.9		116.1
ALL PRODUCTS			256.2		551.2

[1]Average annual statewide prices as published in *Texas Timber Price Trends*, Texas Forest Service.

[2]Average annual statewide prices, obtained by adding the difference between the standing timber prices and the delivered prices published in *Timber Mart South* to the stumpage prices published in *Texas Timber Price Trends*, Texas Forest Service.

[3]International ¼-inch rule.

* Data suppressed to avoid disclosure of individual company information.

Table 8. Interstate Movement of Roundwood by Species Group and Product in Texas, 2010						
Product	Units	Imports	Produced & Utilized in State	Exports	Texas Mill Receipts	Texas Roundwood Production
PINE						
Sawlogs	MBF[1]	98,092	955,972	30,801	1,054,064	986,773
Veneer/Panel Roundwood	MCF	2,240	92,182	4,506	94,422	96,689
Pulpwood	cords	438,834	1,284,842	466,923	1,723,676	1,751,765
Others	MCF	2,576	2,669	0	5,245	2,669
All Pine Products	MCF	56,261	353,885	47,319	410,146	401,204
HARDWOOD						
Sawlogs	MBF[1]	4,788	135,845	0	140,633	135,845
Veneer/Panel Roundwood	MCF	342	528	0	870	528
Pulpwood	cords	402,938	667,776	158,178	1,070,714	825,954
All Hardwood Products	MCF	33,380	76,731	12,654	110,111	89,385
TOTAL						
Sawlogs	MBF[1]	102,880	1,091,817	30,801	1,194,697	1,122,618
Veneer/Panel Roundwood	MCF	2,582	92,710	4,506	95,292	97,216
Pulpwood	cords	841,772	1,952,618	625,101	2,794,390	2,577,719
Posts, Poles, Pilings	MCF	2,576	2,669	0	5,245	2,669
ALL PRODUCTS	MCF	89,641	430,616	59,973	520,257	490,589

[1]International ¼-inch rule.

Table 9. Texas Industrial Roundwood Products, 2001-2010

Year	Lumber			Structural Panel
	Pine	Hardwood	Total	
	––––– MBF[1] –––––			MSF, 3/8" basis
2001	1,293,823	213,795	1,507,618	2,732,940
2002	1,425,613	223,932	1,649,544	2,818,356
2003	1,490,311	287,062	1,777,373	2,723,225
2004	1,591,109	324,663	1,915,772	2,859,012
2005	1,733,314	230,090	1,963,403	3,249,558
2006	1,676,461	240,214	1,916,676	2,935,637
2007	1,550,716	180,713	1,731,429	2,503,941
2008	1,406,103	213,191	1,619,293	2,204,544
2009	1,237,801	171,514	1,409,315	1,958,794
2010	1,188,294	139,389	1,327,683	1,881,763

[1]International ¼-inch rule.

Table 10. Texas Pulp, Paper, and Paperboard Production, 2001-2010

Year	Paper Products			Market Pulp
	Paper	Paperboard[1]	Total	
	––––––––––––––– tons –––––––––––––––			
2001	599,902	2,083,326	2,683,228	0
2002	551,367	2,179,423	2,730,790	0
2003	255,462	2,170,185	2,425,647	0
2004	0	2,560,480	2,560,480	0
2005	0	2,512,262	2,512,262	0
2006	0	2,781,865	2,781,865	0
2007	0	2,788,308	2,788,308	0
2008	0	2,239,347	2,239,347	0
2009	0	2,007,054	2,007,054	43,627
2010	0	2,089,521	2,089,521	0

[1]Includes fiberboard and miscellaneous products.

Table 11. Products Treated by Texas Wood Preserving Plants, 2009-2010

Product	Unit of Measure	Volume by Specific Unit		Volume by Cubic Feet	
		2009	2010	2009	2010
Utility poles	number	195,156	167,565	3,286,525	2,821,873
Constr. poles	number	50,639	75	151,917	225
Piling	m lin.ft.	40,026	1	19,621	0
Fence posts	number	2,110,272	1,469,652	1,857,782	1,293,811
Crossties	number	1,950,772	1,989,765	7,200,478	7,344,405
Switch ties	MBF	7,235	6,260	718,930	622,046
Cross arms	number	0	0	0	0
Lumber	MBF	385,849	264,692	32,154,083	22,057,684
Plywood/OSB	MSF	25,820	18,207	806,875	568,969
Other	CF	0	4,363,545	0	4,363,545
Total	CF	–	–	46,196,211	39,072,558

Table 12. Texas Primary Mill Residue, 2010[1]

Residue Type	Pine	Hardwood	Total
	– — – – – – tons – — – – – –		
Chips[2]	2,437,669	255,958	2,693,626
Sawdust	518,767	190,454	709,221
Shavings	265,699	33,059	298,757
Bark[3]	1,289,952	438,161	1,728,113
Total	4,512,086	917,631	5,429,718

[1] Primary mills include sawmills, structural panel mills, and chip mills.

[2] Does not include chips produced in chip mills.

[3] Includes bark from sawmills, panel mills, and chip mills.

Table 13. Industrial Roundwood Removal and Logging Residue by Product in East Texas, 2010

Product	Industrial Roundwood			Residue			Total Volume		
	Pine	Hardwood	Total	Pine	Hardwood	Total	Pine	Hardwood	Total
	– – – – – – thousand tons – – – – – –			– – – – – – thousand tons – – – – – –			– – – – – – thousand tons – – – – – –		
Growing Stock									
Sawtimber	6,339.7	903.3	7,243.0	377.4	130.5	507.8	6,717.1	1,033.8	7,750.8
Poletimber	5,575.7	1,990.7	7,566.4	31.7	111.8	143.4	5,607.3	2,102.4	7,709.8
Sub-total	11,915.3	2,894.0	14,809.3	409.0	242.2	651.2	12,324.4	3,136.2	15,460.6
Non-growing Stock									
Sawtimber	120.8	16.6	137.3	747.4	214.2	961.6	868.1	230.8	1,098.9
Poletimber	746.1	177.4	923.5	584.4	392.4	976.8	1,330.5	569.9	1,900.3
Sub-total	866.9	194.0	1,060.8	1,331.7	606.6	1,938.4	2,198.6	800.6	2,999.2
All									
Sawtimber	6,460.4	919.9	7,380.3	1,124.7	344.7	1,469.4	7,585.2	1,264.5	8,849.7
Poletimber	6,321.8	2,168.1	8,489.9	616.0	504.2	1,120.2	6,937.8	2,672.3	9,610.1
Total	12,782.2	3,088.0	15,870.2	1,740.8	848.9	2,589.6	14,523.0	3,936.9	18,459.8

Note: Sawtimber includes sawlogs, chip-n-saw, veneer logs, and poles; poletimber includes pulpwood, panel roundwood, post, and piling. See documents from the Forest Inventory and Analysis (FIA) Program for definition of growing stock. The separation of industrial roundwood harvest by source was based upon wood utilization rates from the *East Texas Harvest and Utilization Study, 2008*.

Table 14. Removals of Industrial Roundwood and Growing Stock in East Texas, 1992-2010						
Year	Pine		Hardwood		All	
	Industrial Roundwood	Growing Stock	Industrial Roundwood	Growing Stock	Industrial Roundwood	Growing Stock
	– —— – – – – – – —— – – – – MMCF – —— – – – – – – —— – – – –					
1992	496.6	484.7	111.4	113.1	608.0	597.8
1993	512.1	499.9	121.7	123.5	633.8	623.4
1994	522.3	509.8	139.6	141.7	661.9	651.5
1995	523.5	515.3	143.1	145.2	666.6	660.5
1996	543.5	530.5	116.5	118.2	660.0	648.8
1997	557.5	544.2	118.4	120.2	675.9	664.4
1998	542.4	529.4	127.9	129.8	670.3	659.3
1999	541.4	528.5	157.9	160.3	699.3	688.7
2000	508.9	496.7	116.7	118.4	625.6	615.2
2001	488.5	476.8	111.6	113.3	600.1	590.1
2002	537.0	524.2	130.6	132.6	667.6	656.7
2003	542.1	529.1	126.1	128.0	668.3	657.1
2004	517.7	505.3	133.5	135.5	651.1	640.8
2005	564.3	550.8	137.2	139.3	701.4	690.1
2006	500.0	488.1	148.3	150.5	648.4	638.6
2007	501.2	489.2	127.6	129.5	628.8	618.7
2008	440.3	429.8	97.7	99.1	538.0	528.9
2009	396.4	382.6	83.4	86.3	479.8	468.8
2010	401.2	385.9	89.4	90.3	490.6	476.1

Note: Total industrial roundwood harvest includes harvest from both growing stock and non-growing stock. The growing stock removal was calculated using wood utilization rates from the *East Texas Harvest and Utilization Study, 2008*.

Table 15. Tree Planting by Ownership and Funding Source in Texas, 2000-2010

Year[1]	Family Forest								Industry[4]	Public	Total
	Federal Cost Share Programs[2]		Texas Reforestation Foundation (TRe)		All Cost Share Programs		Non-Cost Share[3]	Total Acres	Acres	Acres	Acres
	Acres	Cost Share $	Acres	Cost Share $	Acres	Cost Share $	Acres				
2000	11,496	489,165	5,401	270,451	16,897	694,103	26,284	43,181	120,523	725	164,430
2001	15,818	602,700	6,325	315,030	22,143	917,730	26,295	48,438	108,254	183	156,875
2002	10,772	581,833	5,649	348,273	16,421	930,106	16,743	33,164	80,388	840	114,392
2003	4,938	907,098	3,763	238,903	8,701	1,146,001	17,657	26,358	62,557	1,278	90,193
2004	10,040	945,528	2,091	123,282	12,131	1,068,810	24,765	36,896	74,542	2,248	113,686
2005	11,713	1,267,815	1,061	117,997	12,774	1,385,811	20,522	33,296	69,712	593	103,601
2006	10,034	1,317,024	398	41,896	10,432	1,358,920	16,278	26,710	64,457	863	92,030
2007	12,497	2,073,855	2,912	187,917	15,409	2,261,772	21,820	37,229	67,910	797	105,936
2008	15,585	1,004,163	1,040	78,174	16,625	1,082,337	9,335	25,960	59,764	822	86,546
2009	17,152	746,763	0	0	17,152	746,763	13,639	30,791	81,067	564	112,422
2010	16,255	1,569,178	0	0	16,255	1,569,178	5,919	22,174	70,577	555	93,306

[1] Federal fiscal year. For example, fiscal year 1995 begins on October 1, 1994 and ends on September 30, 1995.

[2] Includes Forestry Incentives Program (FIP), Stewardship Incentives Program (SIP), Environmental Quality Incentives Program (EQIP), Conservation Reserve Program (CRP), Forest Land Enhancement Program (FLEP) accomplishments, Emergency Forestry Conservation Reserve Program (EFCRP), Wetlands Reserve Program (WRP), and Landowner Incentive Program (LIP). Federal funding also includes the Ice Storm Recovery Program in 2002 - 2004.

[3] Non-cost share acres include only family forest acres planted with TFS assistance.

[4] Acres for industry tree planting includes acres planted by Timber Investment Management Organizations (TIMOs) and timberland Real Estate Investment Trusts (REITs).

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