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An overview of Washington state's forest products industry for prospective partners in business, investment and research.

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The Forest Resource

The forests, streams and lakes provide Washington with its nickname “The Evergreen State.” The state is a prime destination for outdoor enthusiasts and is known for its productive forests and the diversity of its forest products industry.

Washington state is home to approximately 21 million acres of forestland. Over 48 percent of the land in Washington is forested, a much higher ratio than the national average of 33 percent. Forty four percent of the forestland is owned by public agencies, 20 percent by private industry and 19 percent by nonindustrial private owners.

The Cascade mountain range splits Washington into two regions containing distinctly

est of the Cascade Mountains, a cool, mild climate and ample rainfall help create lush forests contain a large percentage of the world’s most beautiful and valuable temperate rain forests. East of the Cascades, a temperate, sunny climate and low rainfall support open forests of ponderosa and lodgepole pine.

A Variety of Trees

another 38 percent of the total harvest. Western hemlock is used to produce general construction lumber and also in the manufacture of pulp for papermaking. Cedar species, primarily consisting of western red cedar, comprise approximately 10 percent of the total harvest. Cedar products (including lumber, shakes, and shingles) are valuable because of their decay resistance and durability. Sitka spruce, which is extremely valuable because of its unique combination of light weight and high strength, is used to manufacture specialty components, while its superior acoustic properties make it suitable for sounding boards in musical instruments. Red alder, which makes up approximately 4 percent of the total harvest, was once considered to be a “weed” species because of its

Today, high quality western red alder, is used in furniture making and cabinet manufacturing. Ponderosa pine and lodgepole pine, which together make up about 8 percent of the harvest in Washington, possess straight grain and good machinability, making them excellent species for moulding, millwork, and wood window components.



Environment

Washington's forest management focuses on ecologically sustainable production, assuring a continuous resource supply with minimal reduction in biological diversity. Washington's commitment to protecting its forestlands has resulted in some of the nation's most comprehensive and innovative forest practices rules. In addition to these rules, according to sustainable forestry guidelines. The majority of these forestlands have been the state of Washington.

Washington state law requires that reforestation occur within 3 years of harvest at a minimum stocking level of 190 seedlings per acres in western Washington and 150 seedlings per acre in eastern Washington. However, in western Washington, an average of 350 seedlings per acre are planted each year. Current research in this area is focused on developing more productive seedlings to replace the trees that are harvested. Due to favorable growing conditions, Washington forests exhibit a high rate of annual growth, exceeding harvest by 37 percent, on a volume basis. The forest products industry important manufacturing industries in Washington. Annual value added (by manufacture) is nearly \$4 billion. In 1999, Washington's forest products industry produced over 4 billion of plywood, and that specialize in the forest products industry are located in Washington, as well as a variety of research institutions. Together these institutions enhance the quality of the support services available to the Washington forest products industry. The commitment of approximately 4.2 billion board feet. This is a remarkable feat considering that during the same period, the number of sawmills declined by 46 percent while employment declined these declines by increasing worker productivity by 29.2 percent, from 284 thousand board feet (mbf) per employee in 1989 to 367mbf/employee in 1999.



Primary Wood Products

The ideal climate, soil, and growing conditions in Washington's forests allow the state to foster a thriving primary wood processing industry, making Washington home to many leaders in the forest products industry. In 1999, there were 74 lumber producers and 13 plywood producers in Washington, including some of the world's largest corporations. Washington primary wood products sector (including logs, lumber, and plywood) provided a value added manufacturing contribution of almost \$2 billion to the economy of Washington state.

Softwood Lumber

Softwood lumber is the most widely used wood product in Washington. The stability, and straight grain of these species make them an excellent material for construction and framing purposes. Species such as lodgepole pine and ponderosa pine have good processing characteristics and provide an excellent raw material for molding, millwork, and other remanufactured wood products. In 1999, 4.22 billion board feet of softwood lumber was produced in Washington, accounting for over 90 percent of the state's total wood product production.

Hardwood Lumber

Hardwood lumber is primarily produced from western white pine and Douglas fir. The production of furniture, cabinets, and millwork. In 1999, 325 million board feet of hardwood lumber was manufactured in Washington, accounting for over 90 percent of the state's total wood product production.

Plywood

Plywood is sometimes used as an overlay to improve the surface appearance of plywood used in furniture and cabinet production. Although the supply of large diameter logs suitable for the manufacturing of plywood is declining, advanced processing technologies enable mills to utilize small diameter logs for plywood production. In 1999, 1.1 billion board feet of plywood was produced in Washington, accounting for over 90 percent of the state's total wood product production.



Value-Added Wood Products

The forest products industry in Washington manufactures a wide variety of high quality, value-added wood products. While the production volume of value-added products is smaller than that of primary products, their highly valued characteristics, such as color, grains, and surface quality enable higher returns. In 1999, value-added wood products brought revenues totaling \$3.8 billion, exceeding the total revenue of the primary wood processing industry. Recently, the production of engineered wood products, including glulam lumber, LVL, and wood I-joists, has increased rapidly.

Remanufactured Wood Products

Washington's remanufactured wood products industry is a growing sector. Currently, 176 companies produce remanufactured wood products and employ 5,200 people in Washington. Of these mills, 65 specialize in windows and doors; 50 in cut stock, resawing lumber and planing; 29 in custom architectural woodwork. The total value of shipments in the remanufactured wood products sector was \$776 million.

Furniture manufactured from hardwood such as alder, maple, and oak is especially appreciated for its beautiful appearance. In 1997, there were 316 furniture and cabinet manufacturers in Washington, producing kitchen and bathroom cabinets, household furniture, and other wood products.

At last count, 48 truss mills were located in Washington with nearly 1,200 workers. The total value of shipments was approximately \$111 million.

Wood pallets used for storing, stacking, and transporting a wide variety of products are produced mostly from lowergrade lumber. Wood pallets play an important role in product distribution and, in 1997, 47 mills produced wood pallets in Washington with a total shipment value of \$82 million.

Engineered Wood Products

Engineered wood products are produced from two or more layers of standard dimension lumber glued face to face. Laminated veneer lumber (LVL) is manufactured similarly to plywood, by bonding veneer panels with a phenolic resin to produce a billet. The billets are hot

pressed into a continuous shape. The billets are then cut into lengths of LVL that are connected by a thin web of plywood or oriented strand-board. There are currently 9 manufacturers of engineered wood products in the state of Washington.



Pulp and Paper Products

The pulp and paper sector is strongly integrated with other manufacturing sectors of the forest products industry because it depends on wood residues for its raw material inputs. Since pulp and paper production requires large amounts of water and electricity, resource-abundant Washington provides an advantageous environment for this sector. As of 1999, there were 34 pulp and paper mills with 9,014 workers in Washington.

In 2003, 4.17 million tons of paper and paperboard were produced in Washington, amount of value added to the state; approximately \$2.2 billion in 1997. Recently, paper mills have increased their use of recycled pulp, with 26 percent of paper products produced in Washington from recycled materials. Typically the pulp and paper industry is broken down into three sectors: newsprint, paper and paperboard, and market pulp.

Newsprint is a high volume product manufactured with high yield and recycled pulps. Over a million tons of newsprint is manufactured in Washington State each year. A majority of this product is used in North America but several hundred thousand tons are sold into the Asian markets.

Washington's paper and paperboard production is 2.5 million tons annually. Paper is board composed of layers of paper) is usually used for packaging. Market pulp is wood pulp produced for sale rather than for internal use in manufacturing paper products. It ket pulp makes up 4.0 million tons of Washington's annual production.



Internationally-Trade Focused

graphical features suitable for port facilities, Washington State is the largest exporter of softwood lumber from ports in Washington.

In response to increasing overseas demand for forest products, Washington's secondary export revenue increased from 1989 to 1999. For example, while exports of pulp and paper products remained stable at about \$1.2 billion during this period, exports of value-added wood products more than doubled from \$93 million in 1989 to \$201 million in 1999.

The excellent quality of Washington forest products is highly valued in overseas markets. The largest importer of Washington forest products is Japan, followed by Canada. The major forest products exported from Washington are:

- hardwood lumber, \$117 million
- chips, \$111 million
- prefabricated building materials, \$31 million
- molding and hardwood joinery, \$48 million
- doors/windows, \$46 million
- pulp and paper, \$1.1 billion

Eighty nine percent of log export volumes and 35 percent of lumber export volumes. Eighty nine percent of total log exports and 57 percent of total lumber exports (by volume) are directed to Japan. With the increasing demand and the limited supply of the world's forest products, Washington will continue to play an important role in the international trade of forest products in the future.



#2 μ 2 © & □ le
2711 Alaskan Way
& □ □ * .

Tel: 206-728-3000

Fax: 206-728-3205

Washington State Department of Natural Resources

Commissioner of Public Lands

P.O. Box 47001

Olympia, WA 98504

Tel: 360-902-1004

Fax: 360-902-1775

Email: information@wadnr.gov

Center for International Trade in Forest Products (CINTRAFOR)

College of Forest Resources

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Box 352100

& □ □ * .

Tel: 206-543-8684

Fax: 206-685-0790

Email: boardman@u.washington.edu

Port of Tacoma

P.O. Box 1837

Tacoma, WA 98401

Tel: 253-383-9426

Fax: 253-593-4564

#2 μ 2 © 1 □ μ

P.O. Box 538

~ 1 □ □ * .

Tel: 425-259-3164

Fax: 425-353-7366

Washington State Department of Community, Trade & Economic Development (CTED)

2001 6th Ave, Ste 2600

& □ □ * .

Tel: 206- 956-3131

Fax: 206-956-3151

Email: trade@cted.wa.gov

APA – The Engineered Wood Association

7011 S. 19th Street

Tacoma, WA 98411-0700

Phone: 253-565-6600

Fax: 253-565-7265

Email: help@apawood.org

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Research and writing: 2000–2001 Center for International Trade in Forest Products (CINTRAFOR) Graduate Students

Production management: Sam Kaplan

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