Minnesota's Forest Resources 2010

Department of Natural Resources
Division of Forestry
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Resource Assessment
413 SE 13th Street
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Minnesota's Forest Resources

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Preface

This report is compiled annually by Minnesota DNR – Forestry Division, Resource Assessment and Utilization & Marketing Program staff. Publication began in the mid 1980s by John Krantz, former Utilization & Marketing Program Coordinator. The report is intended to answer frequently asked questions about Minnesota's forest resources such as: current conditions and trends in forest resources, and forest resource industrial use. Foresters, other natural resource managers, planners, people employed in forest industry, and forest policy makers will find items of interest in these pages.

We thank those who cooperated in providing and updating information for this report. They include many of Minnesota's wood product companies, the Minnesota DNR Utilization & Marketing Program staff (particularly Don Deckard and Anna Dirkswager), Resource Assessment (particularly Dennis Kepler who modified the mill map), and the USDA Forest Service Forest Inventory and Analysis (FIA) unit. Without their cooperation and assistance this report would not be possible.

Highlights:

- *Mill Changes:* Mill shutdowns, slowdowns and curtailments continue to have a large impact on timber markets in Minnesota. Harvest levels of 2008 are down by nearly 800,000 cords compared to 2005 levels, resulting in opportunities (and need) for additional utilization and management of Minnesota's forest resources.
- Timber imports of pulpwood into the state as well exports out of the state saw increases in 2008. This is in contrast over the past two years for imports and over the past four years for exports. It is likely that Minnesota is still a net importer of raw wood as of December 2010, but by a greatly reduced margin as compared to levels of four to five years ago.
- Overall net growth for all species continued to outpace harvest levels. According to 2009 FIA figures, annual net growth of growing stock on timberland was approximately 5.9 million cords, with mortality of approximately 3.8 million cords. According to Draft 2008 mill and fuelwood survey data, the volume of wood harvested and utilized by industry and fuelwood users was approximately 2.9 million cords. Hence, there are significant volumes of wood above current harvest levels potentially available for additional harvest.
- Woody biomass use for energy markets and forest carbon credits are significant emerging issues that will have an impact on forest management in the future. Updates pertaining to woody biomass use for energy are included in this report.

Contact Information

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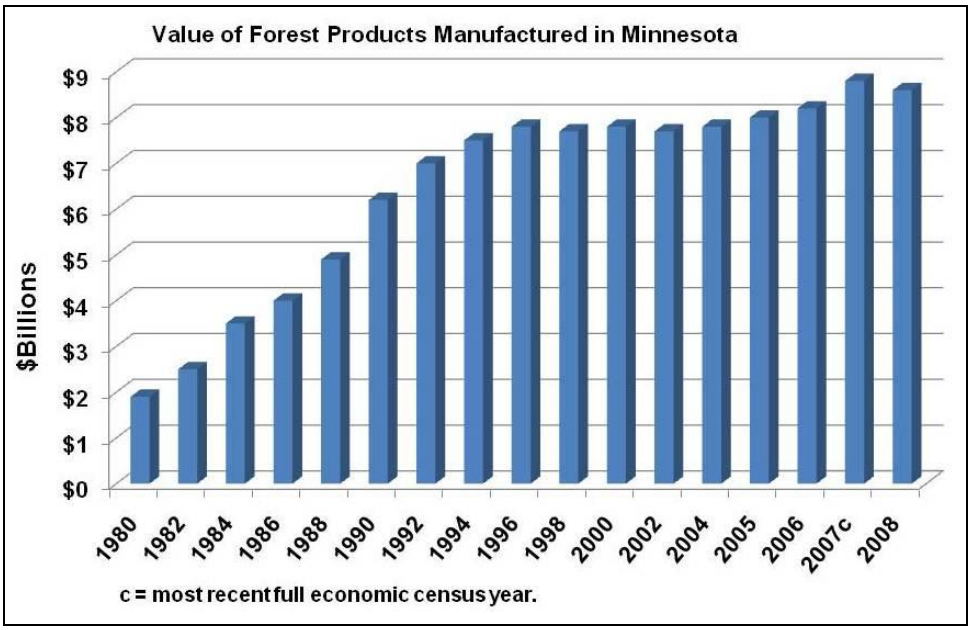
Wood-Using Industry

A brief overview of Minnesota's wood-using industry, including mill location and product information for many of the larger mills, and total industry economic impact.

Minnesota Wood Industry at a Glance – 2010

Annual Economic Impact[1,2]

- Value of forest products manufacturing shipments 2008: $8.6 billion.
- 5th largest manufacturing industry in Minnesota based on gross state product (#1 computers & electronics, # 2 food products, #3 fabricated metal products, and #4 machinery).
- Generates 10 percent of all manufacturing shipments and 1.7 percent of gross state product
- 40,370 total employees (primary processing [including logging & forestry] = approximately 8,600; secondary manufacturing = approximately 31,800).
- $1.8 billion in wages paid.
- Minnesota forest owners receive an estimated $80 million in annual stumpage revenue (3-year average).
- For wood harvested in Minnesota, the value-added impact of primary manufacturing = $24 per $1 stumpage value. For all wood using sectors, total value added impact = $87 per $1 stumpage value.
- Generates $493 million total state and local tax payments (sales, income, and property taxes).



Important Industrial Sectors

Converted paper products, paper & paperboard, window & door components (MN # 2 in U.S.), kitchen cabinets and cabinet parts, store fixtures, wood office & residential furniture, pallets & crating, millwork, and wood shavings (for poultry industry).

Non-Traditional Industries Dependent on Forestry

Balsam boughs for wreath industry (annual sales of $23 million+) and wood energy.

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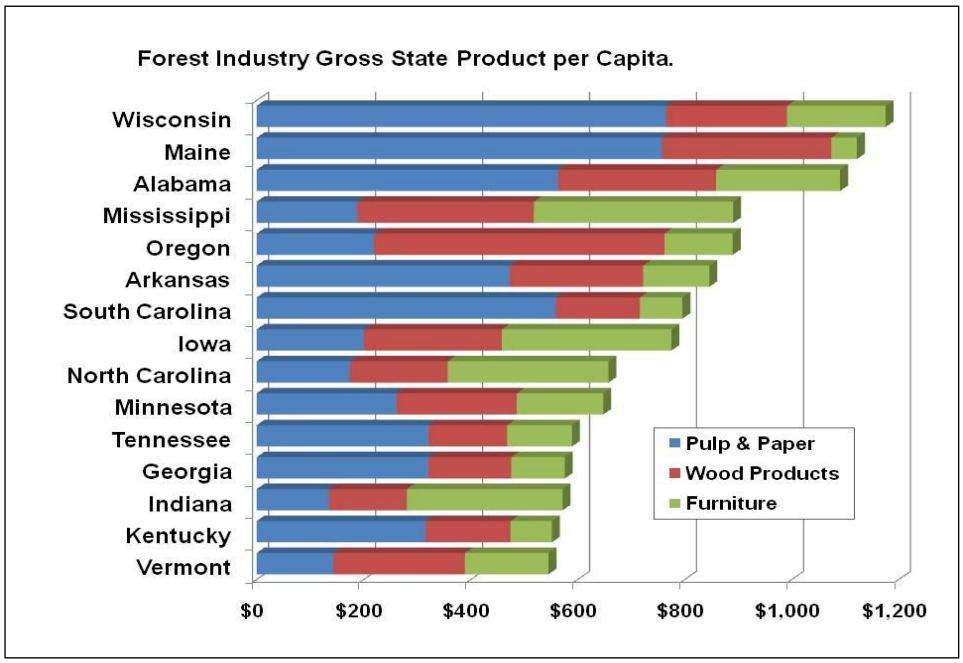
[1] Skurla, James A. et al. 2010. The Economic Impact of Minnesota's Forestry-Related Industries on the State of Minnesota. Duluth, MN: Bureau of Business and Economic Research, Univ. of Minnesota. Available online at URL:https://lsbe.d.umn.edu/uploads/bber%20forest%20econ%20report%20final_082310_d5562caf9774b26c6cc9e7f530f429ac.pdf

[2] Deckard, Donald L. 2011. Economic Contribution of Minnesota's Forest Products Industry – 2011 Edition. St. Paul, MN: Minnesota DNR, Division of Forestry.

Value Added (Gross State Product)
Minnesota is ranked number 10 nationally in forest industry value added (gross state product) per capita.



Manufacturing Facilities

- 5 Pulp and Paper Mills
- 3 Recycled Pulp & Paper
- 2 Hardboard & Specialty
- 2 Oriented Strand/Structural Board
- 500+ Sawmills
    - Around 30 sawmills have annual production levels greater than 2,000 cords, four sawmills have annual production levels greater than 35,000 cords.
- 150 Associated Specialty Businesses
- Over 800 Secondary Manufacturers

Annual Volume of Timber Harvested

- *Pulpwood* = 2.18 million cords (2008)
- *Sawlogs & Specialty = 245 Million Board Feet* (2007/08) including the following specialty items:
  -Veneer = 4.5 Million Board Feet (domestic), plus 0.6 Million Board Feet (exported)
  -Shavings = 11,000 Cords (animal bedding)
  -Posts & Poles = 8,000 Cords
- *Fuelwood = 196,000 cords live trees from timberland (2007-08)*

Minnesota Pulp and Paper – 2010

Firm	Wood Used	Product
UPM - Blandin Paper Mill Grand Rapids	Aspen, Balsam Fir, Spruce	Lightweight coated publication papers
Boise White Paper, LLC International Falls	Aspen, Balm, Pine, Spruce, Balsam Fir, Birch, Tamarack, Ash, Maple	Office papers, label and release papers, base sheets, business and specialty printing grades
Verso Paper Sartell	Aspen, Balsam Fir, Spruce	Coated and uncoated publication papers
NewPage Duluth	Balsam Fir, Pine, Spruce	Uncoated, lightweight supercalendered magazine and publication papers
SAPPI North America Cloquet	Aspen, Balm, Maple, Basswood, Birch, Tamarack, Pine	Coated freesheet fine printing and publication paper, market pulp
Wausau Paper Brainerd	Market Pulp	Tape backing
Recycling Mills		
Rock-Tenn Company St. Paul	Recycled Paper & Corrugated	Cardboard and corrugated boxes
NewPage Recycled Fiber Mill Duluth	High Grade Office Paper & Computer Paper	Market pulp
Liberty Paper Company Becker	Recycled Paper & Corrugated	Cardboard and corrugated boxes

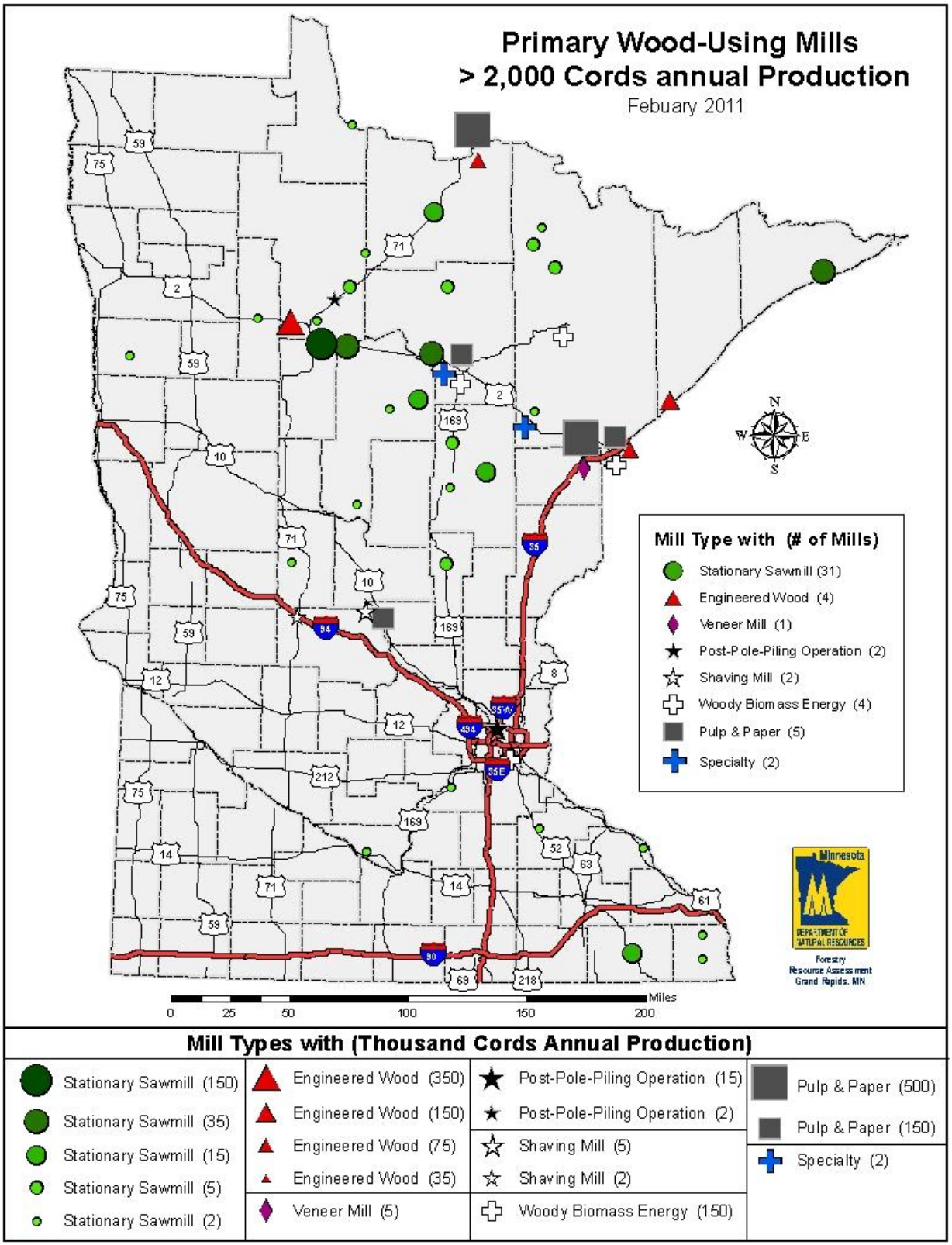
Minnesota Oriented Strand Board and Engineered Wood Products – 2010

Firm	Wood Used	Product
Louisiana-Pacific Two Harbors	Aspen, Balm, Birch	OSB – engineered siding panel
Norbord Bemidji	Aspen, Balm, Birch, Maple	OSB
Trus Joist - a Weyerhaeuser Business Deerwood		Engineered lumber products (Permanent shutdown 12/10)

Minnesota Hardboard and Specialty – 2010

Firm	Wood Used	Product
International Bildrite International Falls	Aspen, Balm & Recycled Paper	Sheathing
Georgia-Pacific Corporation, Superwood Division Duluth	Aspen, Pine, Mixed Hardwoods	Industrial hardboard
Certainteed Corporation Shakopee		Roofing felt (Temporary shutdown since 9/07)

Green shading indicates mills not currently operating



Location of mills is an important factor in determining markets for wood. The map above shows the OSB, pulp & paper, recycled fiber, hardboard, sheathing and larger sawmills in Minnesota. These mills utilize various species of wood material, with aspen pulpwood being by far the largest component.

Wood Energy and Woody Biomass Utilization

Woody biomass can include entire living and dead trees, brush stems, and also residue material generated throughout various forest product processing steps.

Woody biomass is increasingly being used in renewable energy producing facilities in the state.
Wood energy is not new to Minnesota, especially in the wood manufacturing industry. However, rising fossil fuel prices, climate change concerns and other factors have resulted in wood energy markets expanding significantly over the past three years. The outlook is for continued expansion.

The prospect of expanded woody biomass harvesting and processing can have many potential benefits, including: reduced dependence on foreign energy sources, improved bottom lines for logging and processing operations, and increased opportunities for forest and wildlife management.

However, as with almost any opportunity, there are potential pitfalls to be avoided. Some of these include: impacts to raw material supply for existing forest industry, nutrient depletion on sensitive sites, and negative habitat consequences. Every one of the potential downsides can be managed, but doing so will require thoughtful guidance as woody biomass markets expand.

Sources of Woody Biomass
Some sources of woody biomass include:

- Logging Residue. Tops and limbs leftover from commercial timber harvest operations.
- "Primary" Mill Residue from sawmills, etc. Almost all is presently utilized for various products; mostly energy.
- "Secondary" Mill Residue from cabinet manufacturers, etc. The large majority is presently utilized.
- Dedicated energy crops. A very small resource in Minnesota at present.
- Land clearing projects. This contributes to the metropolitan wood supply for a major energy facility.
- Brush from brushlands. A significant potential resource, but the economics of harvesting and procurement technology need to improve before widespread use.
- Precommercial thinning, Timber Stand Improvement (TSI), Fire Hazard Reduction, and Vegetation Management Projects. A potential resource from intensified forestry and wildlife management.
- Urban Forests. A resource from tree clearing and maintenance and storm cleanup in urban areas. Largely used in mulch markets in major metropolitan areas as well as for energy in St. Paul.
- Roundwood. Given mill shutdowns and curtailments, a meaningful amount of woody biomass in the form of roundwood has been used over the past few years.

Markets for Woody Biomass
Woody biomass markets normally use portions of the forest resource without traditional forest product markets such as tops and limbs, small diameter timber, some forms of wood manufacturing residue, and perhaps brush.

Two main factors keep small-diameter timber, tops and limbs and brush from being used for most traditional forest products:

1) The high percentage of bark relative to wood fiber; bark fiber is not suitable for many products.
2) The high cost of processing smaller-diameter material; processing efficiency is greater when using larger material.

Woody biomass is a good fit for a number of products and markets including:

- Engineered Wood: The Georgia-Pacific hardboard mill in Duluth and the International Bildrite insulite mill in International Falls are the two engineered wood product mills in Minnesota that take bark-on chips.
- Special Forest Products (SFP): Markets include log furniture, craftwood, etc. These tend to be small volume, but high value markets.
- Landscape Mulch: Markets are limited in rural Minnesota, but are significant near metropolitan areas.
- Animal Bedding: Animal bedding markets are limited in some of the highly forested regions of Minnesota due to most of the poultry and dairy industry being located in the central and southern portions of the state.
- Energy: Energy is by far the largest market for woody biomass in Minnesota. The table below contains a list of some of the larger (> 100,000 oven dry tons annually) woody-biomass energy facilities in the state.

Some Large Wood-Fired Energy Producers in Minnesota		
COMPANY NAME	**CITY**	**FUEL**
MINNESOTA POWER	GRAND RAPIDS	MILL RESIDUE, LOGGING RESIDUE, ROUNDWOOD
SAPPI	CLOQUET	MILL RESIDUE, LOGGING RESIDUE, ROUNDWOOD
MINNESOTA POWER	DULUTH	MILL RESIDUE, LOGGING RESIDUE, ROUNDWOOD
ST. PAUL DISTRICT ENERGY	ST. PAUL	URBAN WOOD RESIDUE, ROUNDWOOD
LAURENTIAN ENERGY AUTHORITY	HIBBING/VIRGINIA	LOGGING RESIDUE, MILL RESIDUE, ROUNDWOOD
FIBROMINN	BENSON	TURKEY MANURE, WOOD CHIPS, ROUNDWOOD
MINNTAC TACONITE KILN	MOUNTAIN IRON	MILL RESIDUE

In addition to the list above, there are many small medium and small wood processing companies that burn some or all of their wood waste for heat and/or process steam.

Guidelines for Woody Biomass Harvesting

Because there are important ecological and environmental reasons for leaving some residue on-site after a timber harvest, the Minnesota Forest Resources Council and the DNR developed site-level forest management guidelines for harvesting woody biomass. The guidelines are available online at: http://www.frc.state.mn.us/initiatives_sitelevel_management.html

Forestry Opportunities

What are some forestry opportunities engendered by the developing woody biomass markets?

Logging Residue. In addition to local economic benefits, use of this material can, on some sites, improve ease and success of regeneration and reduce fuel loading and fire danger

Forest Health Management and Invasive Species Control. Opportunities may include bark beetle control in small diameter pine thinnings, spruce sanitation harvests to control dwarf mistletoe, and others.

Brush from Brushlands. There are potential wildlife habitat benefits from brushland management.

"Precommercial Thinning", Timber Stand Improvement (TSI) and Fire Hazard Reduction. A source of currently non-economically recoverable woody material is produced during forest management activities such as very early thinnings and wildfire hazard reduction work. If the economics become profitable and ecological concerns are addressed, the potential benefits of doing more of this work could be significant.

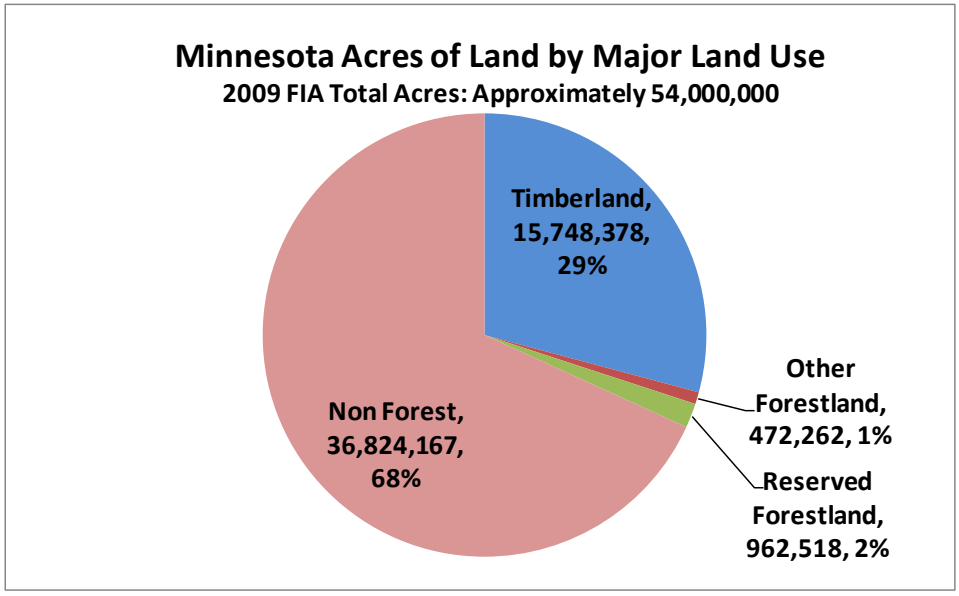
What is the Future for Woody Biomass?

- Potentially, future policy trends leading towards reduced green house gas emissions and increased renewable energy development point towards expansion of woody biomass utilization over the next decade and beyond.
- Technologies to expand the use of biomass for increased value added products like motor fuels and green chemistry are edging towards commercial deployment.

- There are forestry and wildlife management opportunities engendered by expanding biomass markets. Research to identify opportunities is being conducted, in part by funding sources such as the Legislative-Citizen Commission on Minnesota Resources (LCCMR).
- Greater use of woody biomass is an emerging issue. It will take some time to sort out on both the natural resource management side, and also the market side. Natural resource management considerations, procurement and processing systems, and markets will evolve over time.
- The use of woody biomass for biofuels and energy likely greatly depends on energy prices (e.g. oil and electricity) and chemical prices.

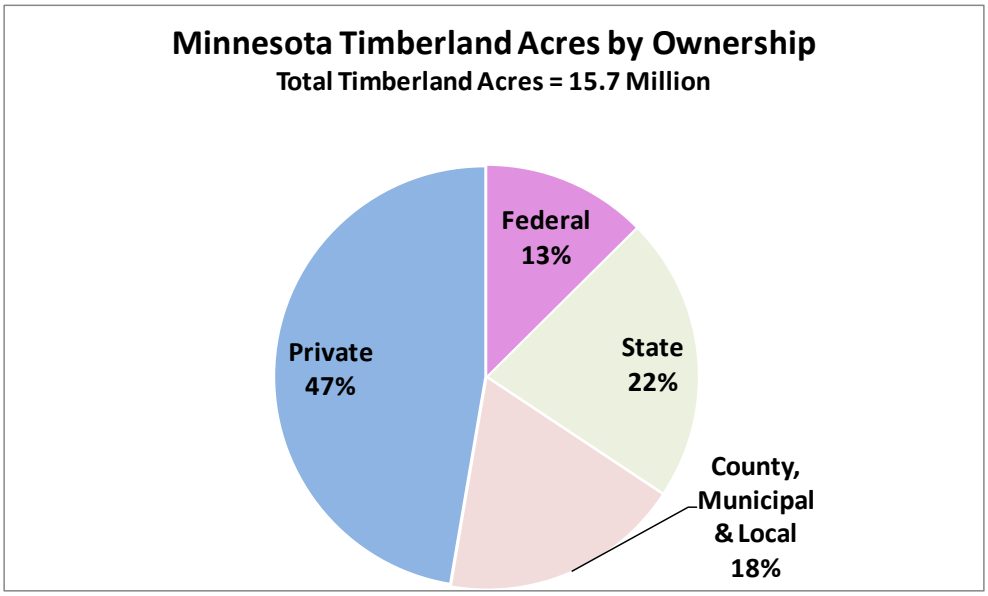
Forest Resources

A brief overview of Minnesota's forest resources, including total forestland and timberland acreage, cover type percentages and an ownership breakdown for timberland.



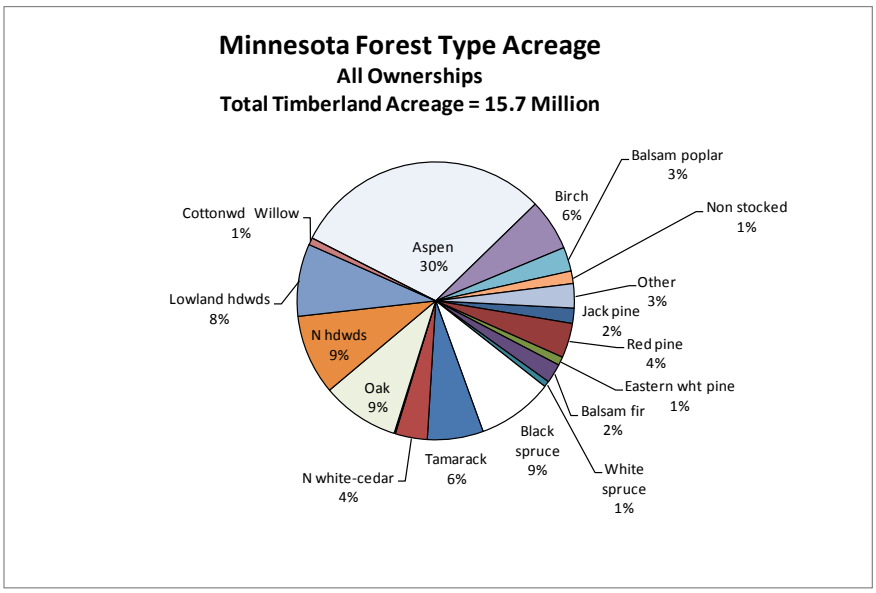
Source: USDA Forest Service 2009 FIA Database

According to 2009 FIA data, Minnesota currently has about 15.7 million acres of forest land that is classified as "timberland". Timberland is forest land that is productive enough to produce a commercial crop of trees and is not reserved from harvesting by policy or law. Reserved Forestland is land reserved from harvest by policy or law, including designated wilderness areas like the Boundary Waters Canoe Area (BWCA), old growth reserves, and others. Other Forestland is mostly forested land of very low productivity for tree growth, such that it is incapable of producing a commercial crop of trees.



Source: USDA Forest Service 2009 FIA Database

Ownership of timberland is an important factor in assessing many issues, including timber supply.



Source: USDA Forest Service 2009 FIA Database

Forest Type: A classification of forest land based on the species forming a plurality of live tree stocking.

It is worth noting that aspen is by far the largest forest or "cover" type in Minnesota.

Area of Timberland in Minnesota by DNR Forest Type – 2009

Forest Type	Acres
Aspen	4,757,118
Northern Hardwoods	1,473,003
Oak	1,420,428
Black Spruce	1,395,847
Lowland Hardwoods	1,332,614
Tamarack	1,023,395
Birch	946,626
Red Pine	637,329
White Cedar	585,671
Balm of Gilead	442,686
Balsam Fir	354,957
Jack Pine	282,201
White Pine	156,619
Cottonwood/ Willow	130,699
White Spruce	108,341
Other Softwoods	23,318
Non-Stocked & Other	677,528
Total All Types	15,748,378*

Source: USDA Forest Service 2009 FIA Database
*Totals may not sum due to rounding.

Harvest Levels

Information on 2008 timber harvest in Minnesota by product category and estimation of contribution by timberland ownership.

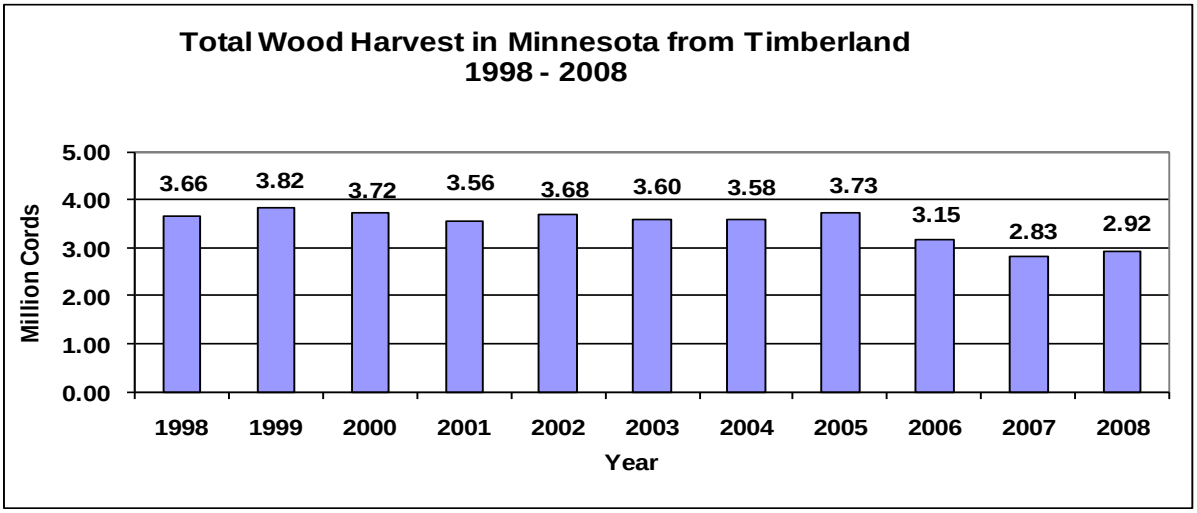
Total Wood Harvested and Utilized by Industry and Fuelwood Users in Minnesota
(In Thousand Cords - by Species – From Timberland)
(Pulpwood 2008 (DRAFT); Sawtimber 2007 (DRAFT): Fuelwood 2007-08)

			Fuel		
Species	**Pulpwood***	**Sawlogs & Others***	**Residential****	**Commercial***	**Total**
Aspen and Balm	1359.3	51.8	31.9	7.3	1450.3
Paper Birch	117.7	14.2	31.0	7.6	170.5
Ash	25.2	8.6	27.1	12.6	73.5
Oak	0.1	73.0	57.5	1.2	131.8
Basswood	12.9	19.8	6.3	0.0	39.0
Maple	136.0	10.5	31.2	1.7	179.4
Cottonwood	26.6	8.2	0.3	0.0	35.1
Other Hardwood	1.3	16.9	2.3	8.0	28.5
Sub-Total Hardwood	1679.1	203.0	187.6	38.4	2108.1
Pine					
Red Pine	28.6	142.4	2.9	0.0	173.9
White Pine	4.7	7.0	0.4	0.0	12.1
Jack Pine	43.5	88.4	1.8	0.0	133.7
Spruce	217.5	24.5	0.3	0.0	242.3
Balsam Fir	149.5	11.1	0.2	0.0	160.8
Tamarack	51.4	7.0	2.0	10.0	70.4
White Cedar	0.9	6.6	0.8	0.0	8.3
Other Softwood	7.5	0.4	0.1	2.2	10.2
Sub-Total Softwood	503.6	287.4	8.5	12.2	811.7
Total	2182.7	490.4	196.1	50.6	2919.8

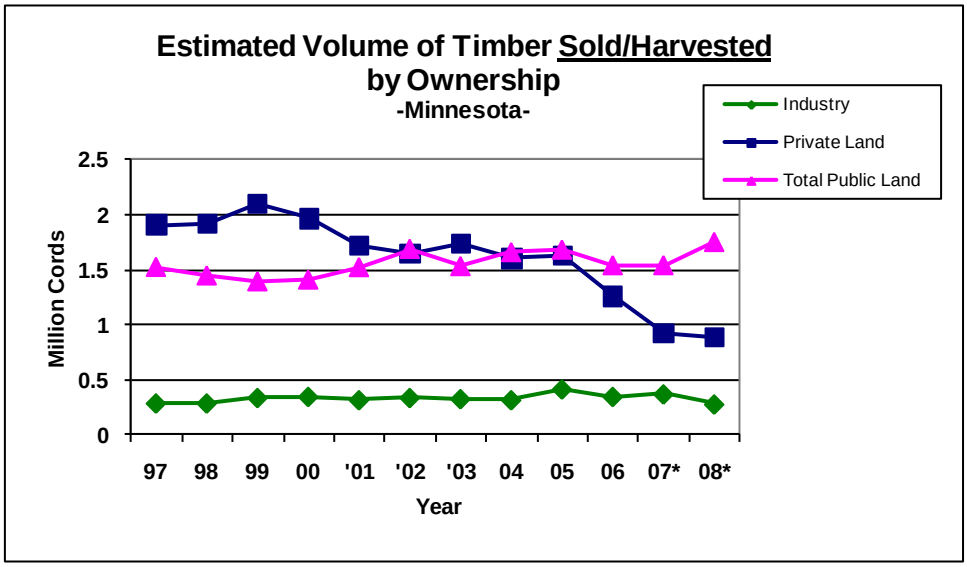
Sources: USFS and MN DNR mill surveys & residential fuelwood survey.
-Figures in chart may not total exactly due to rounding
*Draft **Fuelwood removed from live trees on timberland.

-Figures include cords of pulpwood exported to Wisconsin and Canada: Aspen: 103,700; Spruce: 33,500; Birch: 27,900; Maple: 11,400; Balsam Fir: 9,900; Tamarack: 9,600; Jack Pine: 8,000; Red Pine: 4,600; Ash: 1,300; Basswood: 900; White Pine: 700; Red and White Oak: 100; and total cords of sawlogs exported to Wisconsin and Iowa of: 29,460, most of which is oak and maple.

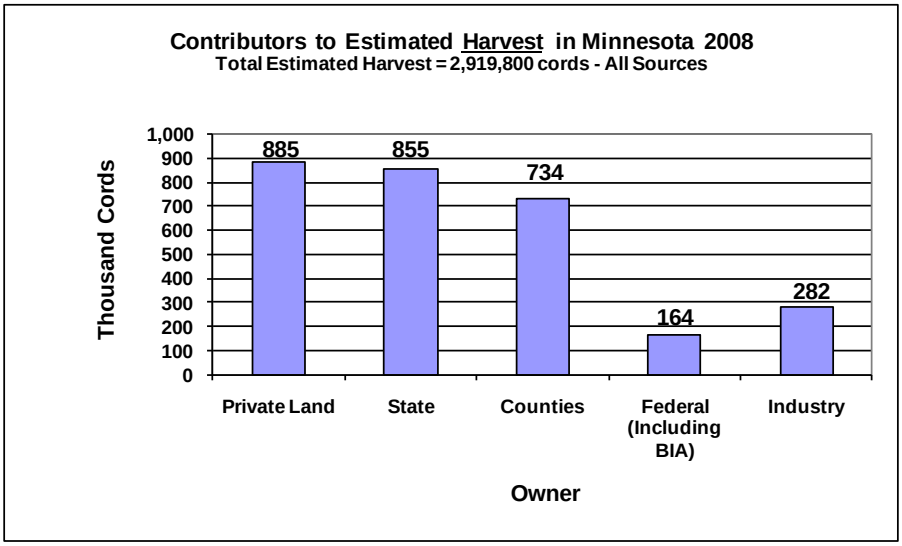
Note: Actual survey figures will be available later but based on initial analysis of mill consumption, it appears that harvest levels have remained in the 2.8 to 3.0 million cord range in 2009.



Sources: Pulpwood (USDA Forest Service, Northern Research Station), Sawtimber & Fuelwood (MN DNR surveys).

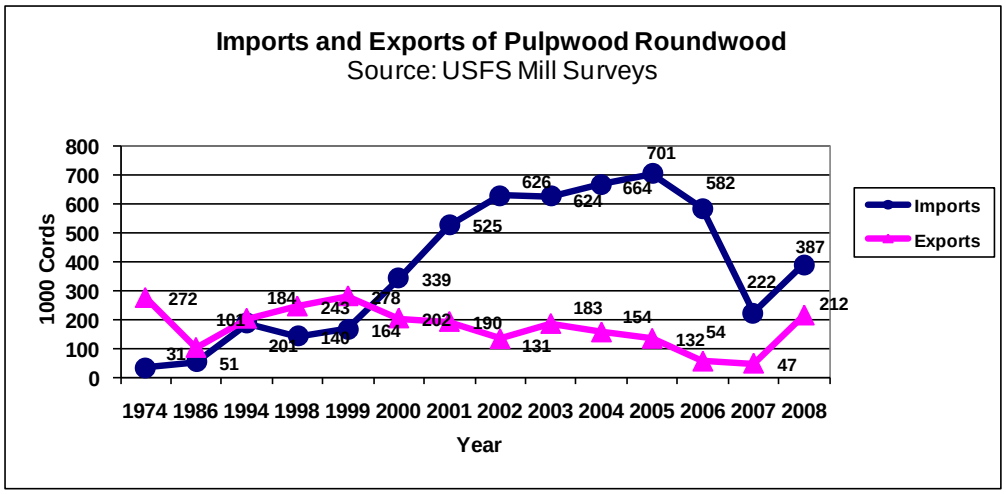


Source: Public Lands: Public Stumpage Price Review through 2006. ***Beginning with 2007, annual volume scale reports (harvested) are used for State and Federal lands rather than volumes sold. Change necessary due to large volumes of re-offered wood sold by public agencies in 2007.*** Industry Lands: Minnesota Forest Industries estimate of harvested volume from 2008. Private Lands = an estimate calculated as follows: Total estimated harvest 2008, minus 2008 public volume harvested (sold through 2006), minus 2008 estimated industry volume harvested. Forest Capital Partners (formerly Boise) Timberlands contained in "Industry" totals.



Source: State Lands: FY 2008 Harvest, DNR Timber Sales Annual Report. Federal: FY 2008 Harvest, Superior National Forest Timber Statistics, and Chippewa National Forest Timber Statistics; BIA: Public Stumpage Price Review 2008 sold. County Lands: Minnesota Forest Industries survey of 2008 harvested volume. Industry Lands: Minnesota Forest Industries survey of 2008 harvested volume. Forest Capital Partners (formerly Boise) Timberlands included in Industry totals. Private Lands = an estimated figure as follows: Total estimated harvest 2008, minus state, county, national forest and BIA volume harvested, minus estimated industry volume harvested.

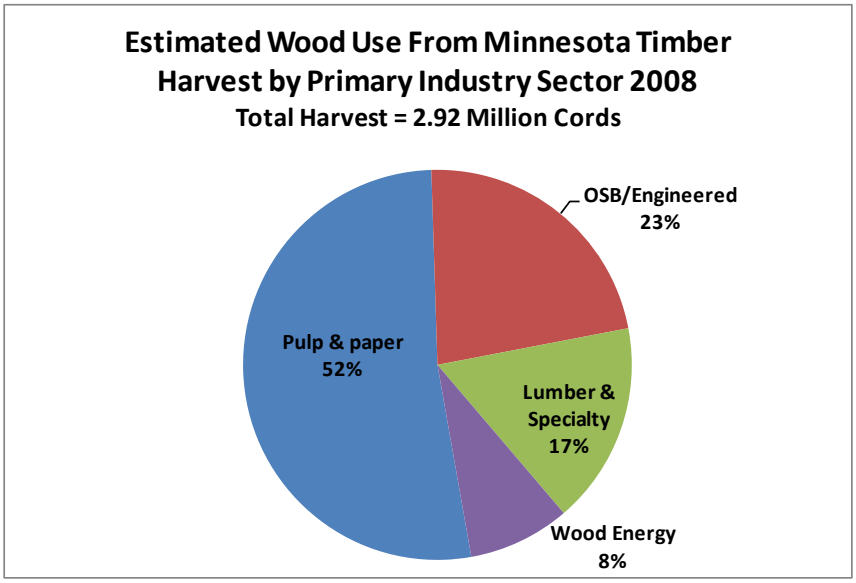
Ownership of lands has a large impact on policy regarding forest management and timber harvest.
It is worth noting that, harvest levels for 2008 are about 87,000 cords greater than 2007 levels, and that the increase was observed due to substantial increases on state land but also due to increases on federal lands.



Source: USFS Northern Research Station FIA Unit Survey of Industrial Wood Using Industry.

Minnesota became a large net importer of wood from 2000 through 2006, as mill demand and stumpage prices increased. Mills increasingly looked outside of Minnesota's borders in order to meet their raw material needs, especially for aspen and maple. Exports in 2008 were mainly to Canada and Wisconsin mills. Imports in 2008 were largely from Wisconsin (303,600 cords), with fair amounts from Canada and Michigan.

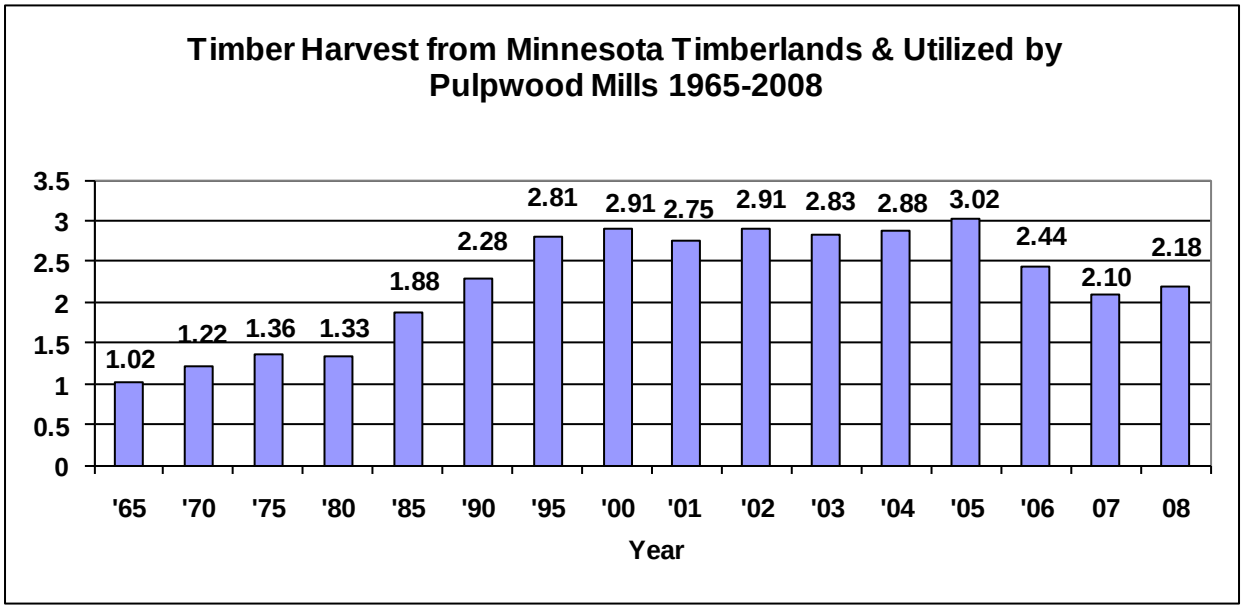
While Minnesota presently remains a net importer of timber, imports remain substantially less than 2005 levels. The change has been due to several factors, most notably reduced demand due to mill closures and slowdowns.



Source: Wood Use Data from Mill and Fuelwood Surveys conducted by USDA Forest Service, Northern Research Station & MN DNR. Specialty products include veneer, posts & poles, shavings & landscape chips.

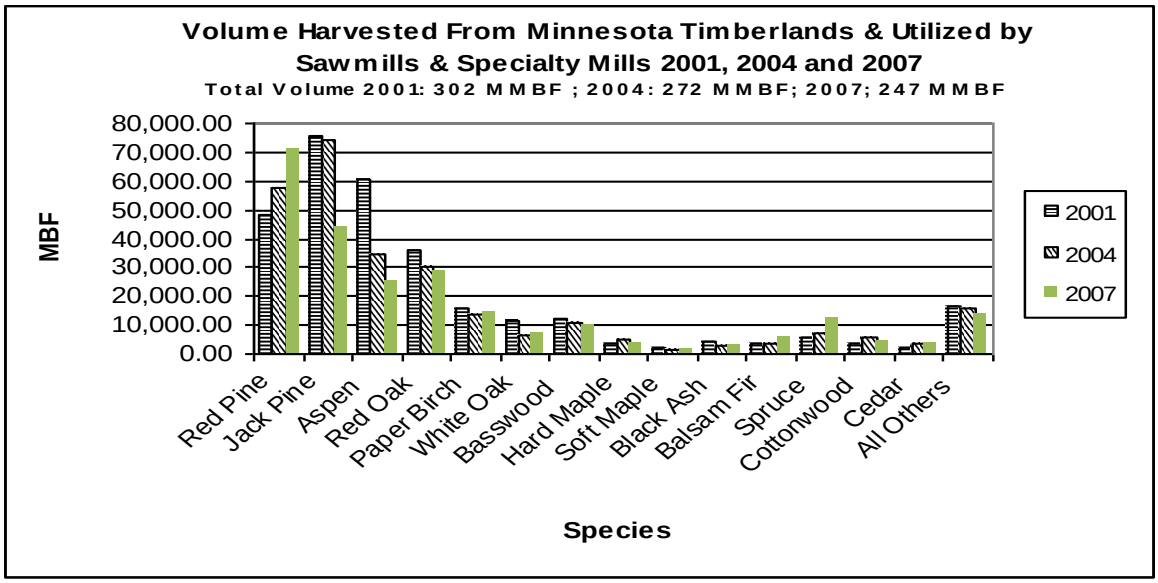
Wood use in the OSB/Engineered wood sector has dropped significantly since 2005, due to mill shutdowns and slowdowns.

Wood use for energy has risen since 2005.



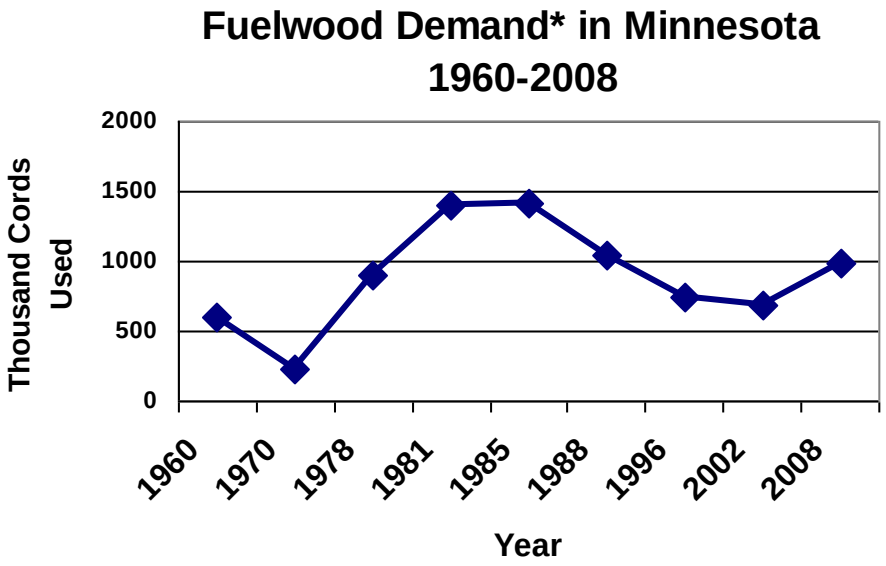
Source: USFS, Northern Research Station Surveys

A major reason for harvest leveling off in the early to mid 2000s, during a period of increasing primary industry demand and use, was the increase in imports. Most of the imported pulpwood was aspen and maple from Wisconsin, and Canada. Imports result in fewer logging, trucking and support jobs in Minnesota. **It is important to note that a significant reduction in timber utilized by pulpwood mills, including imports has occurred since 2005, due largely to mill closures and slowdowns.**



Source: MN DNR Sawmill and Specialty Mill Survey

Sawtimber is often the highest value product for wood that meets merchantability requirements. Generally speaking, a log needs to be at least 8 feet in length and 8 inches minimum diameter inside bark at the small end in order to be of merchantable sawlog size (however, there are an increasing number of sawmills that can utilize smaller diameter material profitably). Sawmill capacity dropped from 2001 through 2007. Jack pine, aspen and oak use dropped off most significantly in the sawmill sector; while red pine actually showed a significant increase in use by sawmills.



Source: MN DNR Fuelwood Surveys

Residential fuelwood is a relatively small portion of total timber harvest.

It is important to note that only a portion of the nearly million cords of total residential fuelwood demand comes from live trees on timberland. About 196,000 cords of residential fuelwood came from live trees on timberland in 2008. The remainder is from sawmill residue, urban tree waste, land and power line clearing, and dead trees.

Sustainable Harvest Information

Sustainable Harvest Levels

This section contains information on estimated sustainable harvest levels* for many of Minnesota's most significant tree species.

*Note to readers: There is no direct correlation between current harvest levels and long term sustained harvest levels because there are many options for moving towards a targeted forest age class structure. Normally, transitions from the current structure to a target age class structure require several rotations. The choice of amount and timing of harvest can vary considerably by decade. Harvest plans are typically assessed periodically as changes to the resource, markets and other conditions dictate.

There is no one best way or time period to reach a target age class structure. Transition harvests may at some time be either lower or higher than long-term sustained yield estimates. Additionally, it is important to note that it is possible to raise future timber availability through intensified forest management resulting in fewer losses to mortality and improved timber productivity. Sustainable harvest estimates can also vary significantly because of differing assumptions used in deriving the estimates, such as rotation age, harvest restrictions, growth and yield, etc.

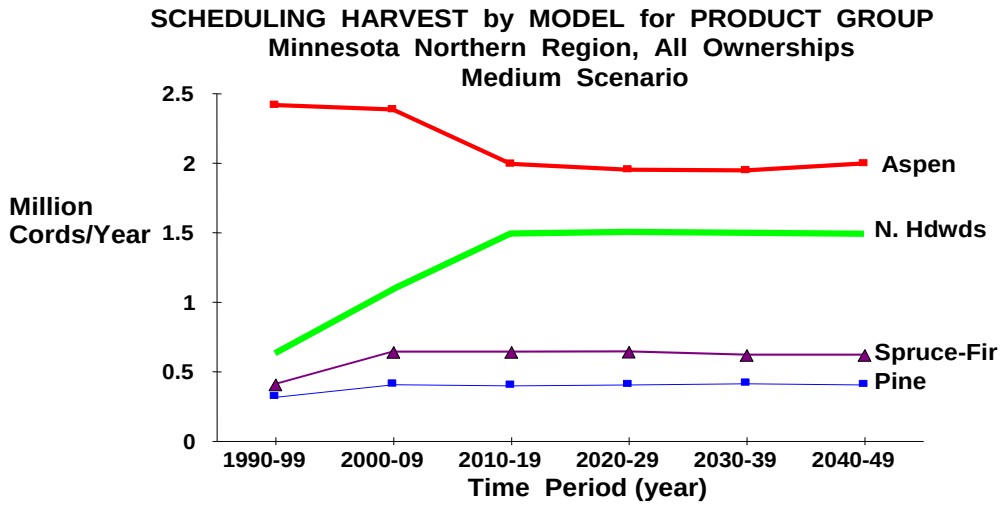
For the above reasons, it is important to view the levels as helpful benchmarks that are only one part of the picture in determining long-term sustainability of our forest resources. They should not be viewed as absolute targets.

DNR sustainable harvest estimates use the full, five-year panel of 2005 FIA inventory data. Estimates are adjusted downward (as appropriate by ownership) for potential timber supply restrictions that can apply to timberlands such as riparian, old growth, leave tree and extended rotation. Rotation ages used to determine the estimates are based on average rotation ages used in the DNR's Subsection Forest Resource Management Plans.

It is important to note that DNR sustainable harvest level estimates are averages over an entire rotation. Generally therefore, for cover types with age-class imbalances resulting from large acreages in older classes, current timber availability is likely to be *above* long-term sustainable estimates. This is due to a need to manage many old stands on timberlands before their health and available timber volume deteriorates. For cover types with young age-class imbalances such as red pine, current timber availability is likely to be *below* long-term sustainable estimates.

DNR is committed to providing excellent analysis, and will therefore periodically review sustainable harvest estimation procedures and assumptions. Future changes to procedure may be made as new information and procedures become available. The UPM Thunderhawk Environmental Impact Statement analysis figures are used for aspen and spruce-fir product groups, as the EIS focused on these product groups. The Thunderhawk EIS analysis was led by Drs. Howard Hoganson and Tom Burk of the University of Minnesota.

For a document explaining the DNR procedure used to estimate sustainable harvest levels, contact Keith Jacobson at: keith.jacobson@dnr.state.mn.us.



Source : GEIS table 6.8 medium scenario, 2nd run (p210 of M.P. & F. Reso. Base, 12/1992)
Assumptions used : Ownership constraints (riparian lands & old growth forests, etc.)

The year 1994 saw the completion of Minnesota's Generic Environmental Impact Statement on Timber Harvesting and Forest Management in Minnesota (GEIS). This study was commissioned by the Minnesota Environmental Quality Board in response to a citizen petition. The GEIS assessed how three levels of statewide timber harvesting activity relate to Minnesota's environmental, economic and social resources. Base, Medium and High harvesting scenarios were looked at: 4 million cords annually, 4.9 million cords annually, and 7 million cords annually. Each scenario was projected over a 50 year planning horizon. The GEIS did not recommend these as levels of harvest to follow, nor should their development and analysis be considered a plan. Rather, they are levels the GEIS study analyzed, in order to determine impacts.

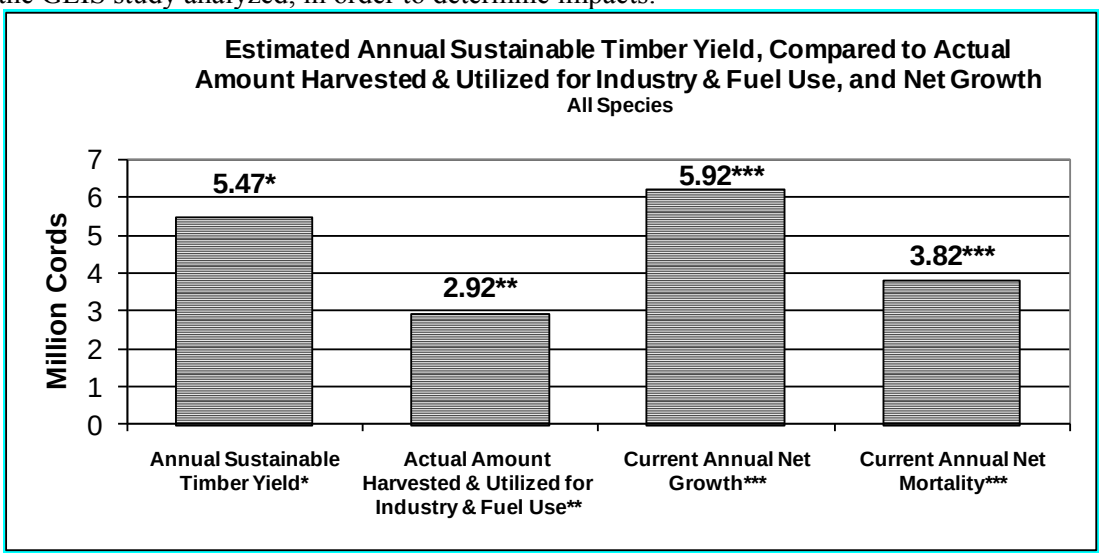
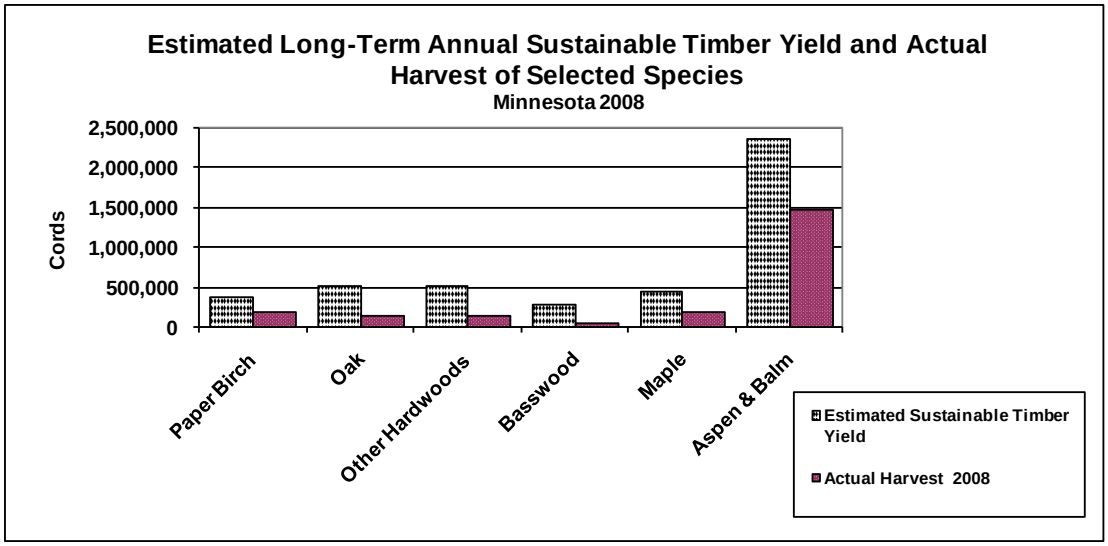
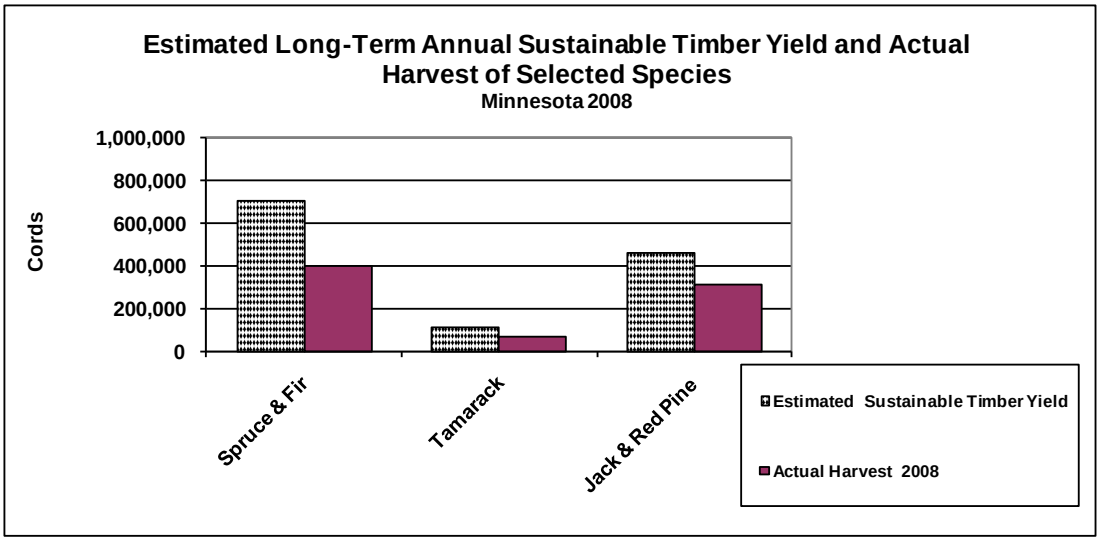


*Table 6.25, GEIS, High Long-Term Sustainable Level, Timber Productivity Tech. Paper, Dec. '92.
** 2008 NFES Pulpwood Survey, 2007 DNR Sawmill Survey, 2007-08 Fuelwood Survey. For Harvest comparisons to Net Growth, it is necessary to add annual "growing stock" logging residue of approximately 275,000 cords to this figure.
***USFS FIA 2009 Database.

Note: While complete capture is not realistic, capture of a portion of annual mortality of approximately 3.82 million cords has the potential to increase net growth and sustainable harvest levels.



Source: Harvest data 2008 US Forest Service pulpwood survey, DNR 2007 sawmill & 2007-08 fuelwood survey. Sustainable timber yield data source as per the notes below.



Source: Harvest data 2008 US Forest Service pulpwood survey, DNR 2007 sawmill & 2007-08 fuelwood survey. Sustainable timber yield data source as per the notes below.

NOTES:

-Sustainable timber yield for aspen and spruce-fir in the figures above are from the UPM-Blandin Thunderhawk EIS analysis (Tables C-20 and C-21 average of high aspen A&B scenario model runs, 40 year planning horizon). Estimates from the Thunderhawk EIS analyses are used for the aspen and spruce-fir product groups, as the EIS analyses focused on these product groups, recognizing considerable detail regarding the mixed species nature of all cover types and projections of forest growth. Generally, the EIS estimates used can serve as upper bound estimates of harvest levels sustainable at least until year 2040 -- these estimates assume that any limited demand for other species will not limit aspen or spruce-fir harvesting from other cover types such as from the birch or northern hardwoods cover types. However, the estimates do not include potential volumes from additional investments in short rotation intensive culture or potential volume increases resulting from investments in pre-commercial thinning. The estimates do take into account allowable cut procedures currently practiced by public land management agencies.

-Sustainable timber yield levels for birch, oak, basswood, maple and other hardwoods, tamarack and jack and red pine in the figures above are based on DNR method of calculating long-term sustainable harvest levels, which consists of area regulation for cover types typically managed as even-aged, and volume regulation for types typically managed as many-aged. Estimates are adjusted downward as appropriate by ownership for potential timber supply restrictions that can apply to timberlands (riparian: 3%, old growth: 0.5%, leave tree: 5%). Rotation ages used to determine the estimates are based on average ages used in the DNR's Subsection Forest Resource Management Plans.

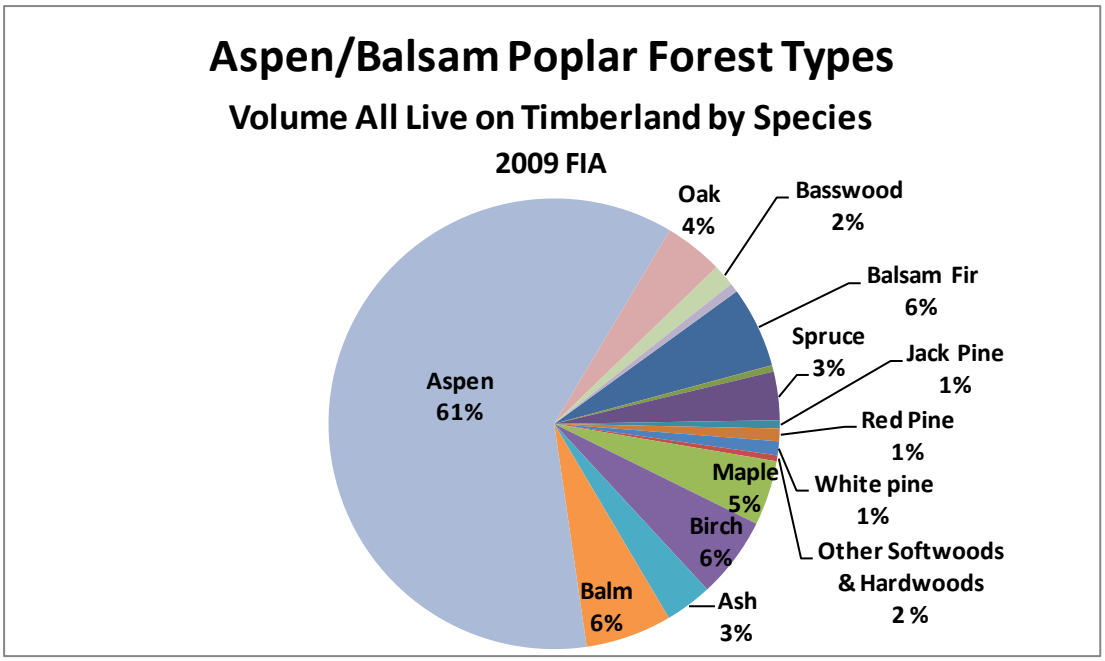
Wood Supply and Demand Information for Important Minnesota Cover Types and Species

Forest resource and harvest level information for Minnesota's most significant cover types and tree species.

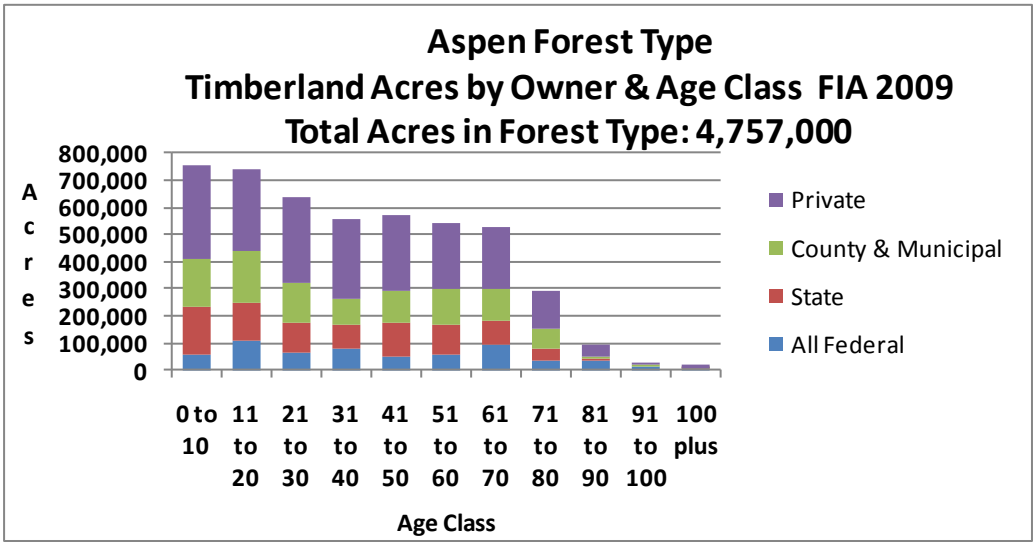
Minnesota's Aspen/Balm of Gilead Resource

Aspen is a relatively short-lived, fast growing tree species that requires nearly full sunlight in order to regenerate. Aspen is by far the predominant cover type and species in Minnesota's forests. It is also the species of greatest industrial use by a wide margin. The aspen resource is why every engineered wood mill in Minnesota is located here, and it is also an extremely important resource to the pulp and paper sector, and the solid wood industrial segment. Many of Minnesota's largest mills were specifically designed to utilize aspen – it fits the products they make and their manufacturing processes ideally.

The aspen cover type is made up of a wide mixture of species. Predominant secondary species include balsam fir, paper birch and oak. Aspen is also a significant component in many other upland cover types.

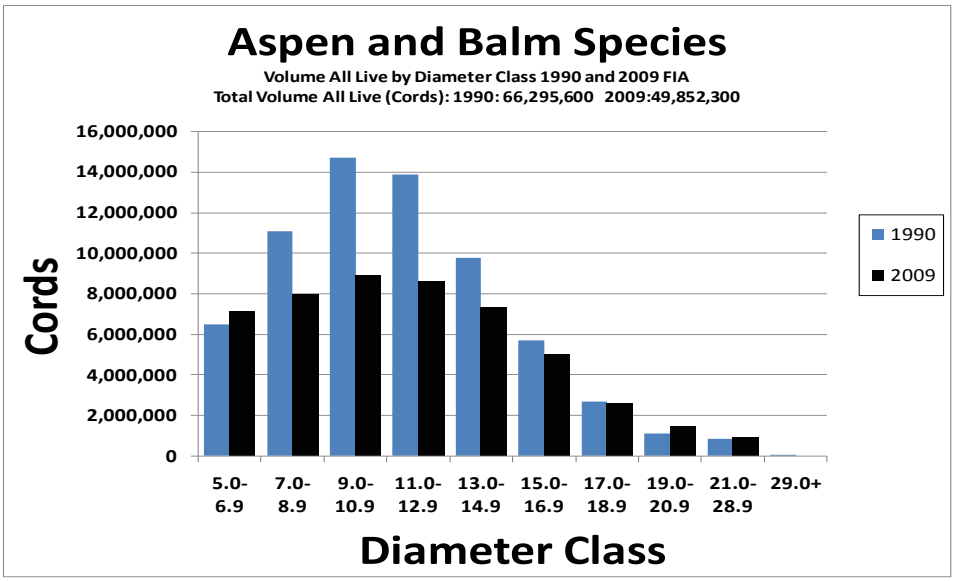


Source: 2009 FIA Database provided by USFS, Northern Research Station



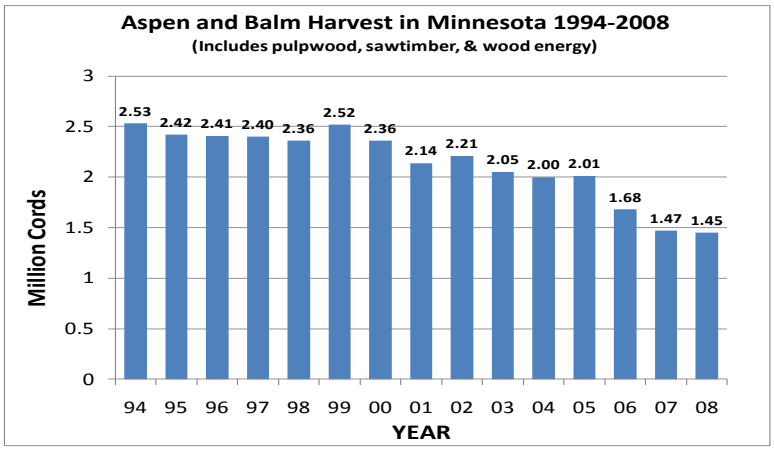
Source: 2009 FIA Database provided by USFS, Northern Research Station

The 2009 FIA inventory indicates a much more even age-class distribution than the 1990 inventory. There is currently far more young aspen than existed 20 years ago, prior to the establishment of solid markets.



Source: FIA Database provided by USFS, Northern Research Station

Total FIA aspen and balm of gilead (balm) volume has gone down since 1990 as significant acreages have been harvested and managed. For at least the next 10 years, more of the available aspen is likely to be found in stands that average less volume than past harvests, which is difficult on efficiency of loggers and mills. However, it is important to note that beginning in 10 to 15 years and then accelerating over time, more high-volume aspen stands will begin to reach harvest age.



Source: Harvest data compiled by NRS & DNR

Annual long-term allowable harvest= 2.358 million cords based on Table C-20 UPM-Thunderhawk DEIS, average of high aspen A&B scenarios, 40 year planning horizon.

Based on the 2009 USFS FIA database, estimated average net annual growth of aspen & balm growing stock: 1,124,300 cords, estimated average annual mortality of aspen & balm growing stock: 1,553,600 cords.

Several factors caused the reduction in aspen and balm harvest from its peak in 1999, including:

- Substitution of alternative species by most large mills.
- Closure of several large OSB mills.

Current Demand for Aspen/Balm of Gilead from Minnesota Timberlands

	Cords
2008 Harvest……... ……	**1,450,400**
• Minnesota Pulpwood Industries ……...……	1,255,700
• Pulpwood Export (To Canada and Wisconsin)……..……	103,700
• Sawlogs & Other……..…	51,800
• Fuelwood (from live trees on timberland)…..…….……	39,200

Source: NRS & DNR Surveys

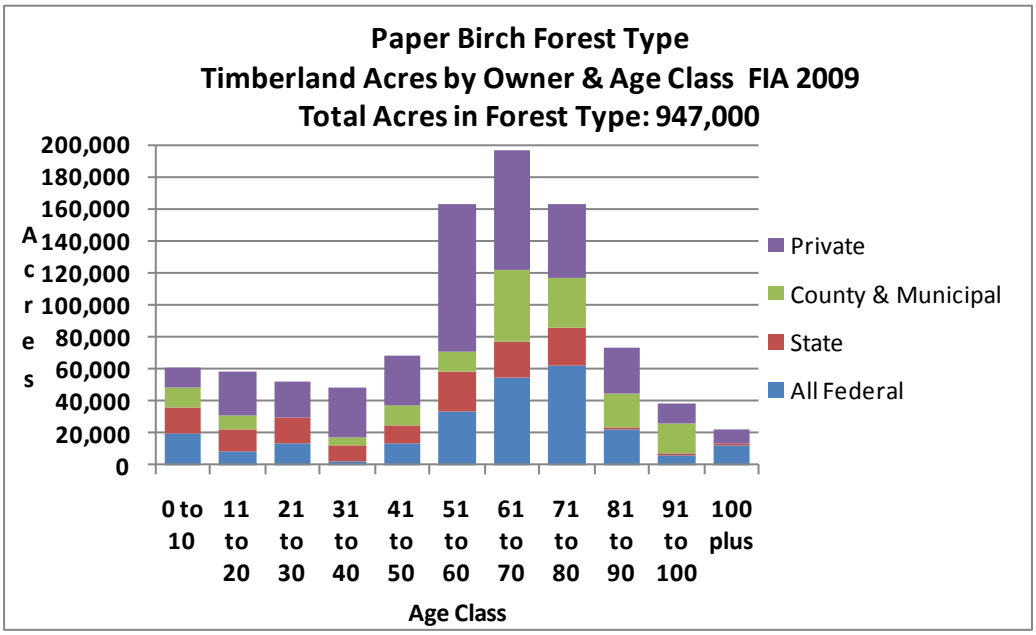
Resource Opportunities:

- The recent reduction in aspen harvest levels has resulted in a situation where current harvest levels are well below long-term sustainable levels.

Resource Issues:

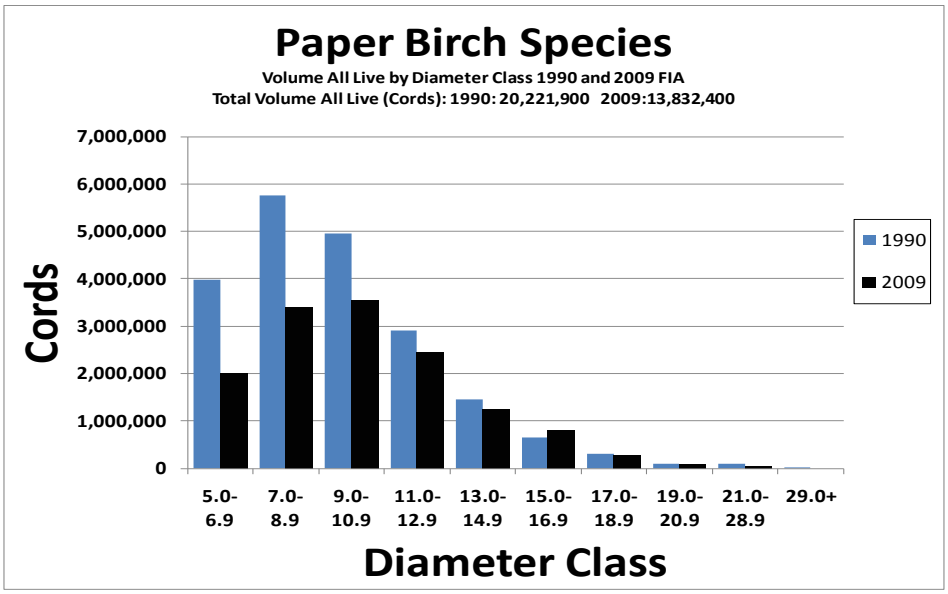
- Readers should note that a great deal of the resource is in private hands, so managing it will require greater efforts in private landowner incentives and assistance.

Minnesota's Birch Resource



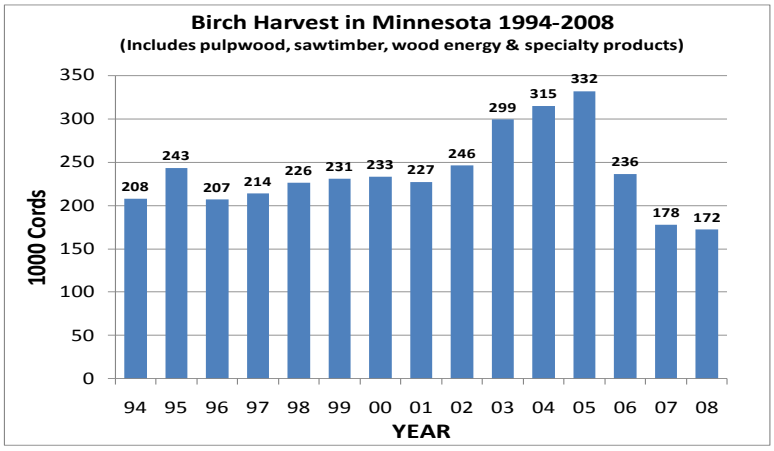
Source: 2009 FIA Database provided by USFS, Northern Research Station

Paper birch is a relatively short-lived species that requires nearly full sunlight for regeneration. It can grow in nearly pure stands, or as a component in mixed stands. It comprises the large majority of the volume in the birch cover type, but it is also a significant component of several other upland cover types, including aspen.



Source: FIA Database provided by USFS, Northern Research Station

Paper birch resources have seen a significant rise in volume after a period of decline during the 1990s. Total volume decline in 1990 was due largely to serious mortality associated with an aging resource and stress caused by periodic drought.



Source: Harvest data compiled by NRS & DNR

DNR estimated long-term annual sustainable harvest level: 371,500 cords/year. Estimated average net annual growth of paper birch growing stock: 50,100 cords, and estimated average annual mortality of birch growing stock: 368,400 cords, based on 2009 FIA data.

Current Demand for Birch from Minnesota Timberlands

	Cords
2008 Harvest	**171,700**
• Minnesota Pulpwood Industries	91,000
• Pulpwood Export (To Canada and Wisconsin)	27,900
• Sawlogs & Other	14,200
• Fuelwood (from growing stock)	38,600

Source: NRS & DNR Surveys

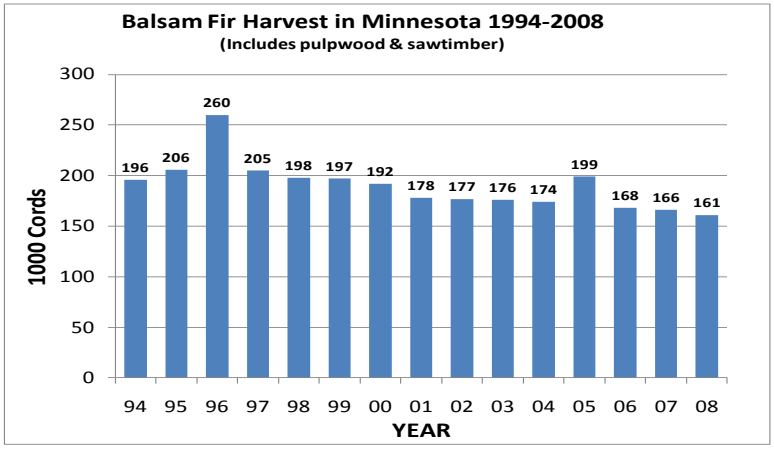
Resource Opportunities:

- Birch harvest is well below long-term sustainable levels.
- Birch in northeastern Minnesota is "fleck-free" (fleck is a common appearance defect in birch), so larger high-quality stems are a fit for veneer markets.

Resource Issues:

- There is a need to improve ability to consistently regenerate birch stands.
- Wood quality. There is significant rot in older birch.
- A major age class imbalance, with significant volumes of older birch.

Minnesota's Balsam Fir Resource



Source: Harvest data compiled by NRS & DNR.

Spruce-fir estimated annual sustainable harvest level 705,500 cords/year based on Table C-20 UPM-Thunderhawk DEIS, average of high aspen A&B scenarios, 40 year planning horizon. Based on 2009 FIA data, estimated average net annual growth of balsam fir growing stock: 195,500 cords; estimated average annual mortality of balsam fir growing stock: 357,000 cords.

Balsam fir industrial use is similar to that of spruce. It is used largely for making high quality paper, where it is prized for its excellent fiber qualities. Some is also used by the sawmill industry, mostly in making studs but also in small quantities for other types of lumber. Some fir is also used in making OSB.

Current Demand for Balsam Fir from Minnesota Timberlands

	Cords
2008 Harvest	**160,800**
• Minnesota Pulpwood Industries	139,600
• Pulpwood Export (To Canada and Wisconsin)	9,900
• Sawlogs & Other	11,300

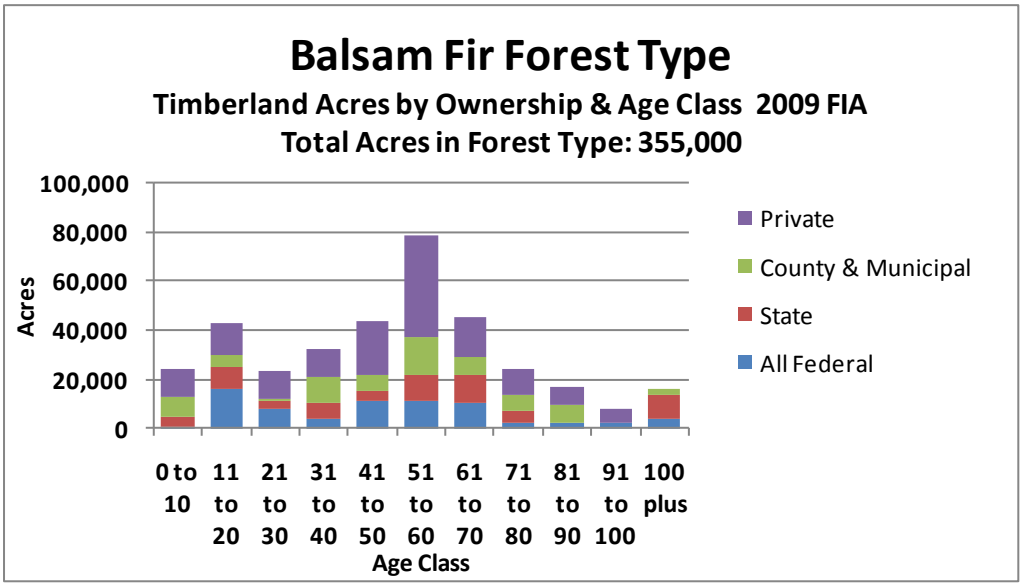
Source: NRS & DNR Surveys

Resource Opportunities

- High-quality balsam fir has excellent qualities for pulp & paper and stud manufacture.

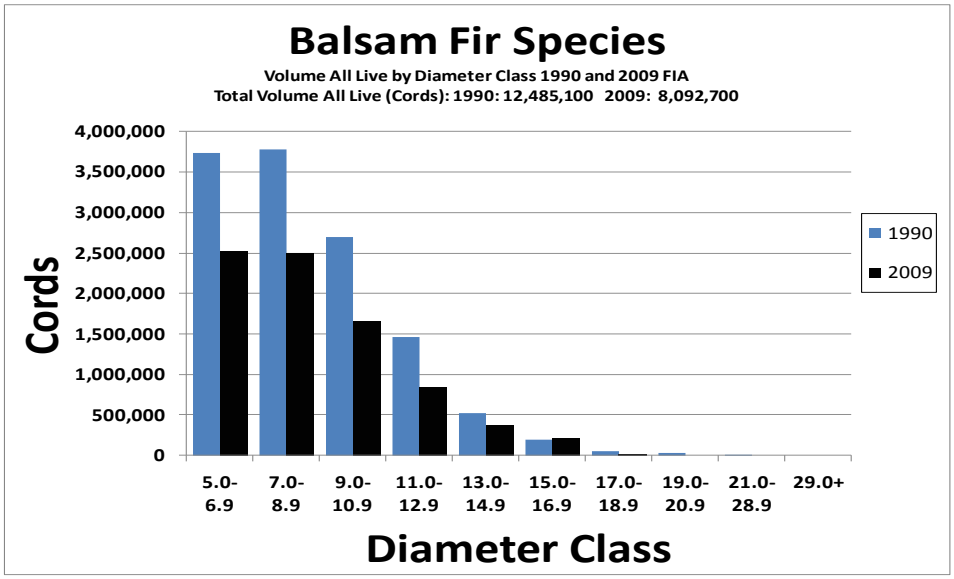
Resource Issues:

- Balsam availability dependent on harvest of aspen (38% of balsam fir in aspen type).
- Older stands susceptible to spruce budworm impact. When there are concentrations of balsam fir over 45 to 50 years of age, spruce budworm will increase to take advantage of their preferred food source. If management favoring more conifers in stands, more extended rotation ages, more reserve trees and more mixed stands result in more balsam fir of older ages, then budworm populations will periodically build up to outbreak levels.
- Age class imbalance.
- Rot in older stands. High rot levels have a major impact on stand merchantability, and therefore ability to manage these stands. Rot is undesirable for higher-value wood products.



Source: 2009 FIA Database provided by USFS, Northern Research Station

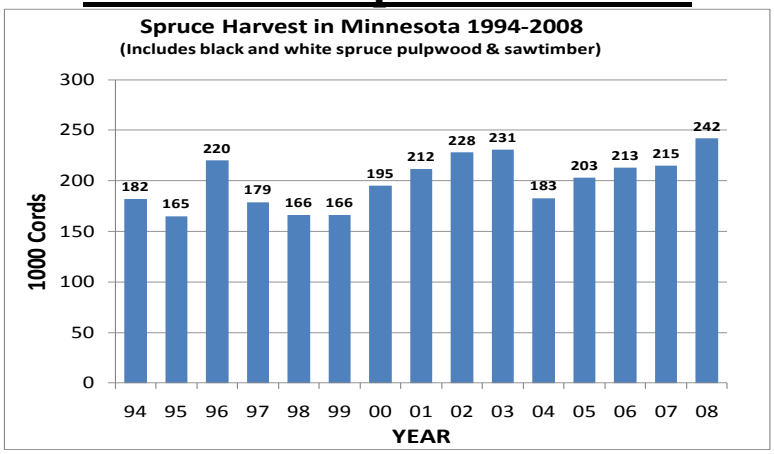
The cover type is dominated by stands at and above 40 years, making this a relatively old resource for such a short-lived species. Recommended rotation ages can vary with stand productivity and site condition, with 50 years a common average (stands managed as extended rotations are carried beyond this age).



Source: FIA Database provided by USFS, Northern Research Station

Much of the balsam fir volume in Minnesota (53%) is found mixed in with the aspen and birch cover types, and is therefore tied to aspen and birch harvest. Total balsam fir volume has dropped significantly since 1990.

Minnesota's Spruce Resource



Source: Harvest data compiled by NRS & DNR

Spruce-fir estimated annual sustainable harvest level 705,500 cords/year based on Table C-20 UPM-Thunderhawk DEIS, average of high aspen A&B scenarios, 40 year planning horizon. Based on the 2009 FIA database, estimated average net annual growth of spruce growing stock: 362,600 cords, estimated average annual mortality of spruce growing stock: 228,000 cords.

Current Demand for Spruce from Minnesota Timberlands

	Cords
2008 Harvest	**242,300**
• Minnesota Pulpwood Industries	184,000
• Pulpwood Export (To Canada and Wisconsin)	33,500
• Sawlogs & Other	24,800

Source: NRS & DNR Surveys

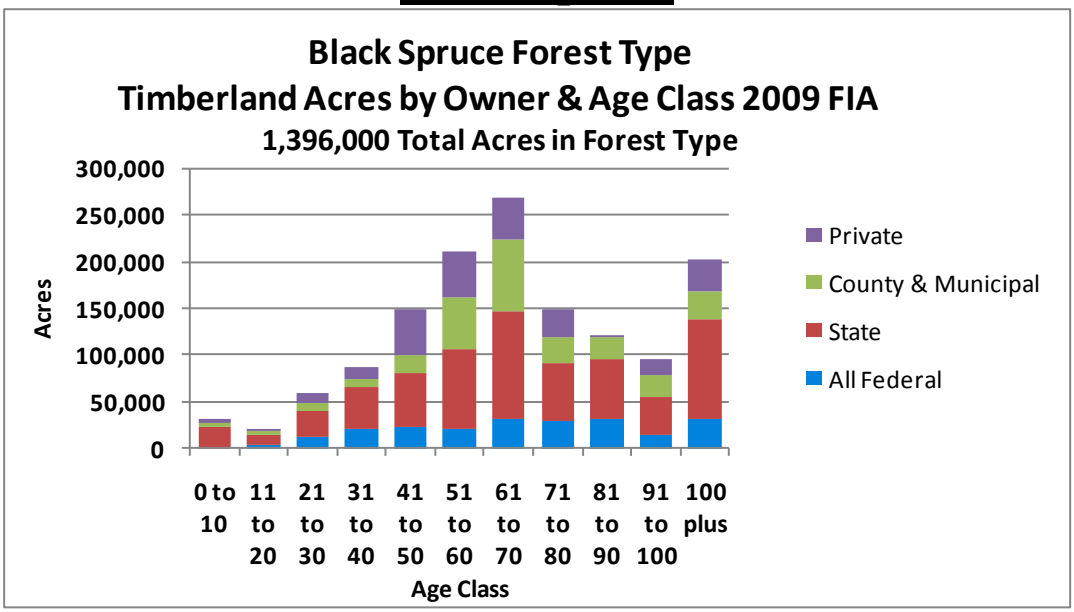
Resource Opportunities

- High-quality spruce has excellent qualities for pulp & paper and stud manufacture. Along with our balsam fir resource, it is the major reason several pulp and paper mills are located in Minnesota.
- Increasing opportunities for thinning white spruce plantations, as stands move into merchantable size classes. Thinning normally yields excellent quality pulp with little or no loss to rot or decay. It can be lower volume productivity work for loggers, however.

Resource Issues:

- Many stands have very low volume/acre of spruce. This increases logging costs, which not only affects logger profitability, but can also impact production costs all the way to finished product. It can also impact the ability to manage some stands.
- Since black spruce is normally found on lowland sites only accessible during frozen conditions, accessibility of the resource is a major issue. Very little summer access.
- Spruce budworm has caused top kill and mortality on white spruce, including plantations. This impact can be lessened by management activities such as thinning to maintain stand vigor and by discriminating against balsam fir in some mixed stands.

Black Spruce

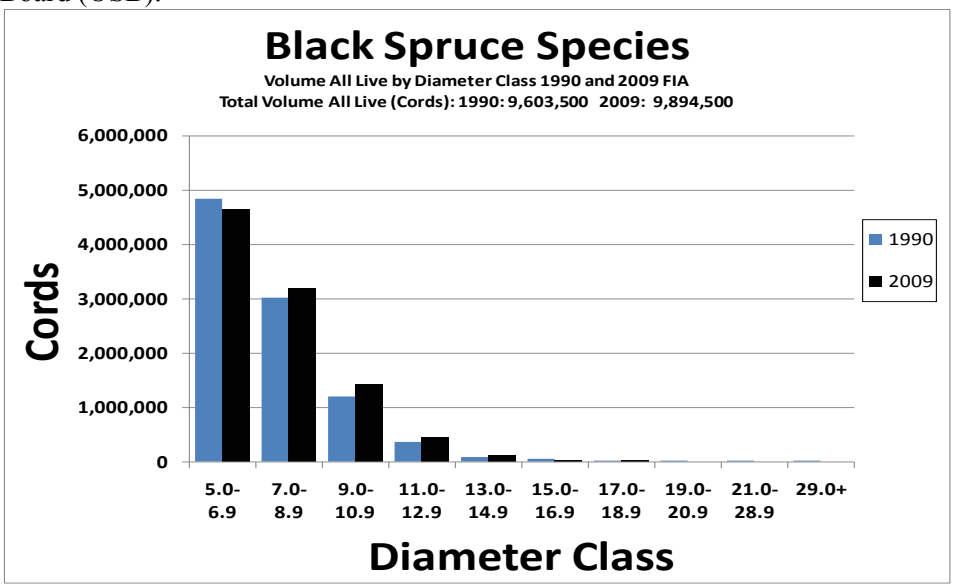


Source: 2009 FIA Database provided by USFS, Northern Research Station

Black spruce cover type acreage is heavily weighted to ages 40 through 80, with a fair amount of acreage also above age 100. Recommended harvest or "rotation" ages can vary with site productivity and site condition from 75 to 120 years of age, with 100 years on average. Stands managed as "extended rotation" are carried beyond these ages. Black spruce exists largely on lowlands, often in nearly pure stands, or mixed with tamarack and/or white cedar and a variety of minor associated species.

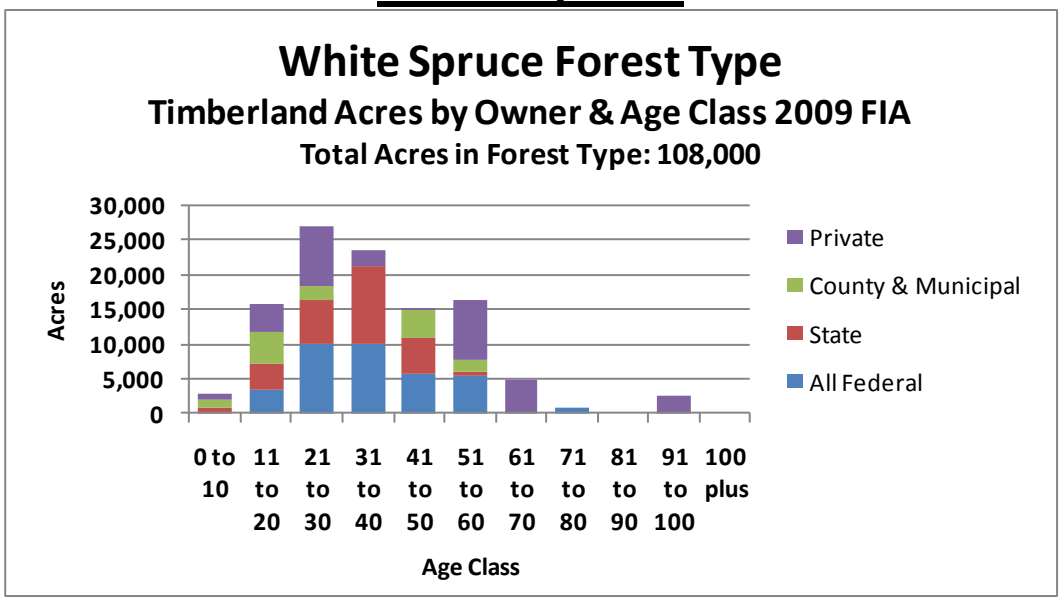
The State of Minnesota is by far the largest owner of black spruce cover type acres, but counties, private owners and our two national forests all have significant acreage.

The vast majority of black <u>and</u> white spruce in Minnesota (over 92%) is used in the making of high quality paper, where it is prized for its excellent fiber qualities. Some is also used by the sawmill industry, mostly in making studs but also in small quantities for other types of lumber. A very small amount of spruce is also used in making Oriented Strand Board (OSB).



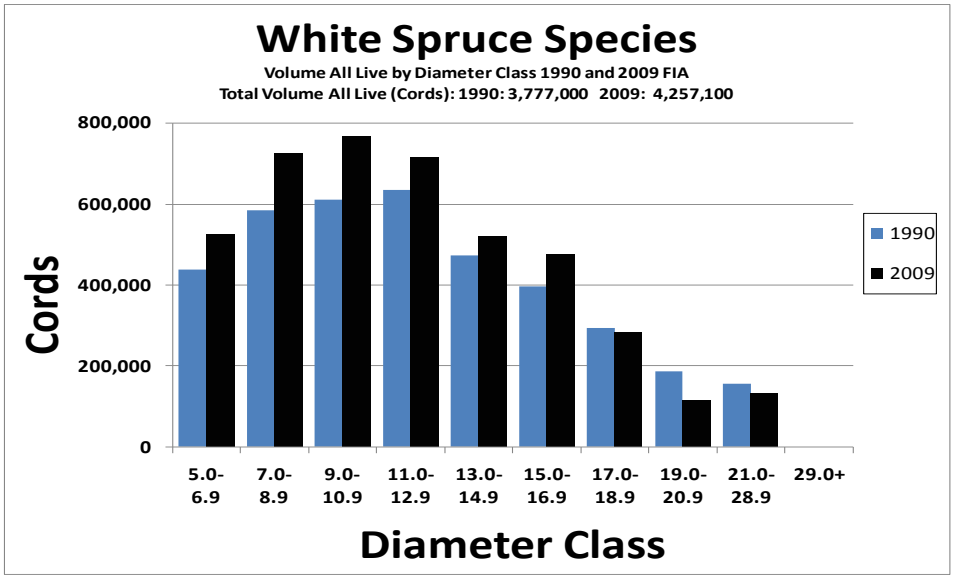
Source: FIA Database provided by USFS, Northern Research Station

White Spruce



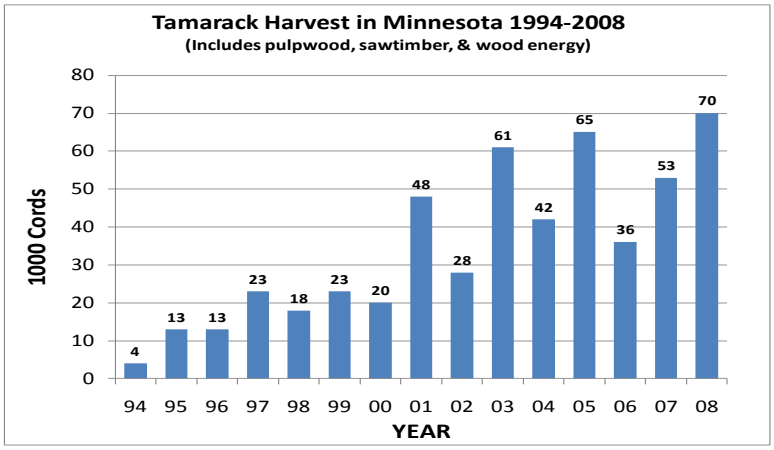
Source: 2009 FIA Database provided by USFS, Northern Research Station

White spruce is a relatively young resource. The cover type is dominated by stands below the age of 50, many of which are in the form of plantations. Recommended rotation ages can range from 60 to 90 years, depending on site productivity and condition (again, some stands managed as extended rotation are held beyond these ages). White spruce is located most often on upland sites, where in natural stands it is commonly found mixed in as a component in aspen, birch, balsam fir & pretty much all upland cover types. A great deal of white spruce volume exists as a component in mixed stands of other upland cover types.



Source: FIA Database provided by USFS, Northern Research Station

Minnesota's Tamarack Resource



Source: Harvest data compiled by NRS & DNR

DNR estimated long-term annual sustainable harvest level = 114,800 cords/year. Based on the 2009 FIA database, estimated average net annual growth of tamarack growing stock: 104,200 cords, estimated average annual mortality of tamarack growing stock: 199,700 cords.

Current Demand for Tamarack from Minnesota Timberlands

	Cords
2008 Harvest	**70,400**
• Minnesota Pulpwood Industries	41,800
• Pulpwood Export (To Canada and Wisconsin)	9,600
• Sawlogs & Other	7,000
• Fuelwood	12,000

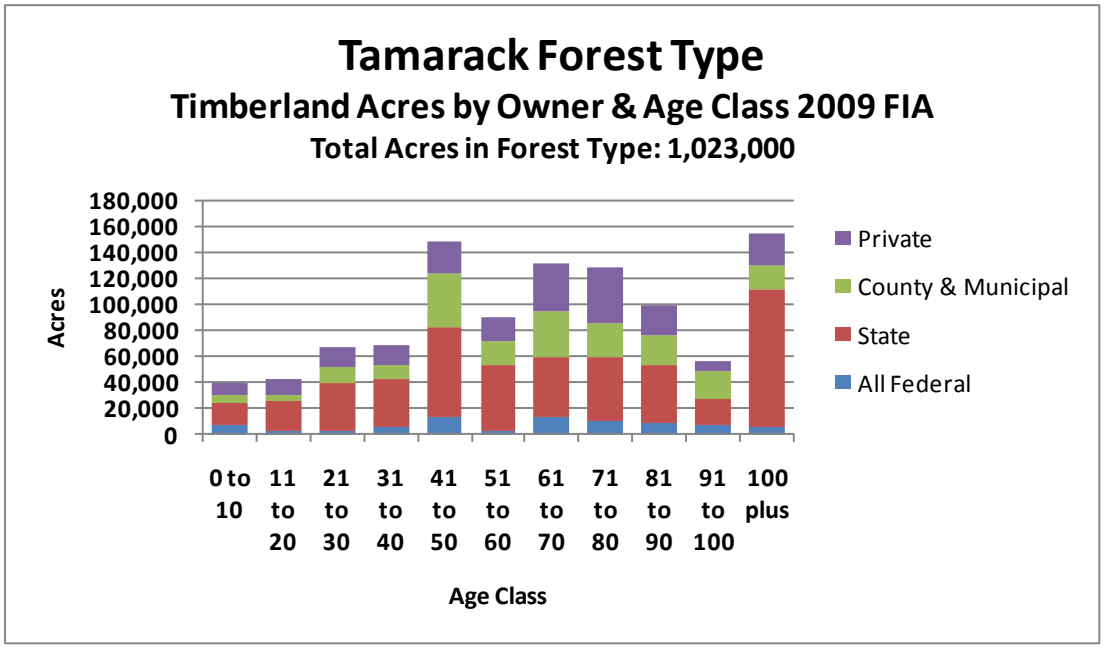
Source: NRS & DNR Surveys.

Resource Opportunities:

- Harvest is well below long-term sustainable levels.
- Total tamarack volume has risen substantially since 1990.

Resource Issues:

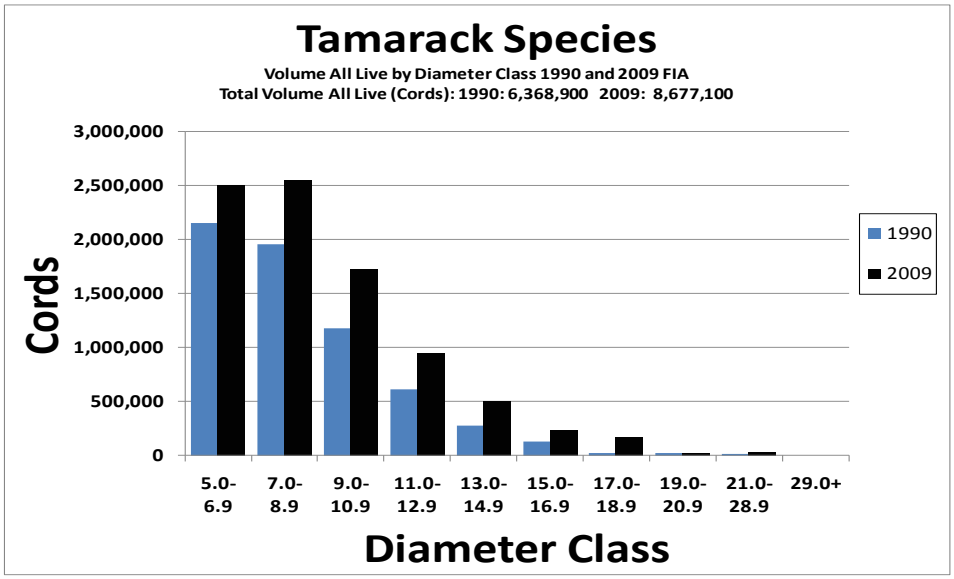
- Many stands have low volumes.
- Serious forest health and mortality issues, especially in older stands.
- Winter access only.
- Uncertain markets with closures of OSB mills that were a significant market.
- Additional market development needed.



Source: 2009 FIA Database provided by USFS, Northern Research Station

Tamarack is dominated by "middle-aged" stands, but there is a fair amount of very old tamarack (average rotation age= 90). The state of Minnesota owns close to 50% of the tamarack cover type.

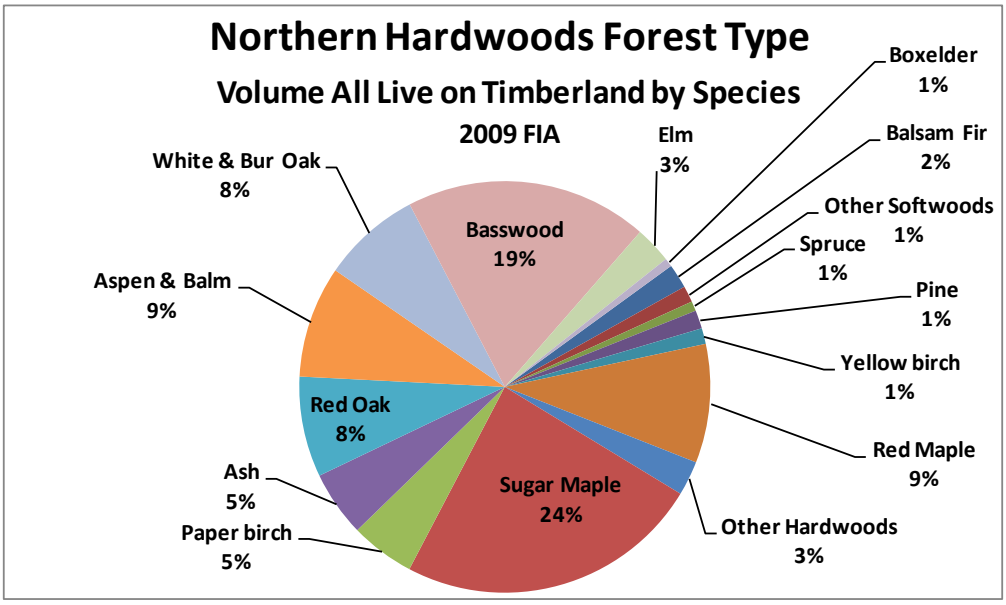
Tamarack is used to a modest extent in the manufacture of OSB and Kraft pulp. Recently, biomass energy facilities have begun to use more tamarack. Markets for tamarack have therefore improved somewhat since the 1990s, although stumpage prices still remain quite low.



Source: FIA Database provided by USFS, Northern Research Station

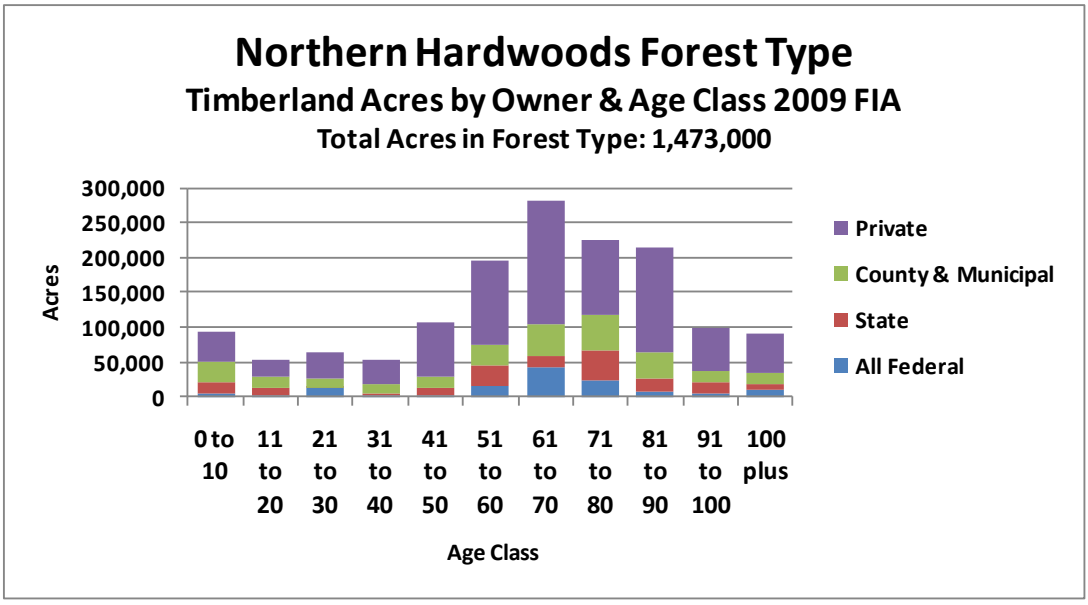
Total volume of tamarack has risen substantially since 1990.

Minnesota's Northern Hardwoods Resource



Source: 2009 FIA Database provided by USFS, Northern Research Station

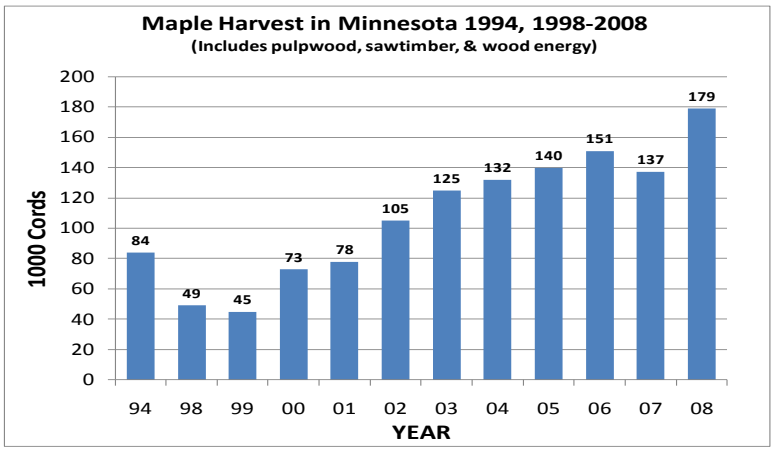
The northern hardwoods cover type is an assortment of a wide group of species. The dominant species are the shade tolerant sugar maple and basswood. There are also significant oak, birch and aspen volumes.



Source: 2009 FIA Database provided by USFS, Northern Research Station

The northern hardwoods cover type is dominated by late "middle aged" stands (average rotation age = 80), many of which are in need of thinning in order to promote optimal growth and forest health. Northern hardwoods are often managed through periodic "thinning" harvests, although clearcutting can be an appropriate tool in some situations. The northern hardwoods cover type is owned largely by private landowners. Continuing and improved availability and use of forest management technical assistance to private landowners is therefore a critical issue for this type. Our northern hardwoods cover type has been something of a "neglected" resource for many years. This has largely been due to a history of poor markets for many hardwood species and sizes in much of the state. The market situation for most hardwoods has changed drastically in recent years, however. Several Minnesota pulp and paper and OSB mills now use maple and other hardwoods.

Maple



Source: NRS Pulpwood Surveys, DNR Sawmill & Fuelwood Surveys.

DNR estimated long-term annual sustainable harvest level = 429,600 cords. Based on the 2009 FIA database, estimated average annual net growth for maple growing stock in Minnesota is 562,300 cords, estimated average annual mortality of maple growing stock is 179,300 cords.

Current Demand for Maple from Minnesota Timberlands

	Cords
2008 Harvest……..	**179,400**
• Minnesota Pulpwood Industries……..…..…..	124,600
• Pulpwood Export (To Canada and Wisconsin)..…….....	11,400
• Sawlogs & Other……...…..	10,500
• Fuelwood……...……..	32,900

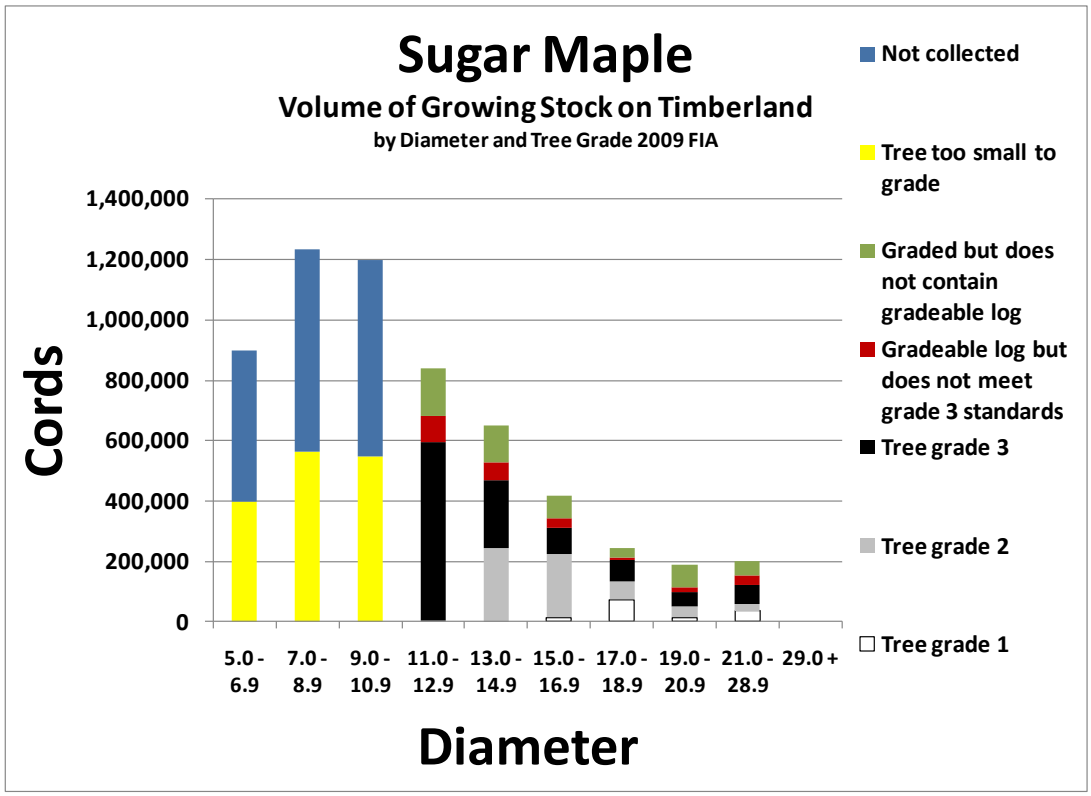
Source: NRS & DNR Surveys.

Resource Opportunities:

- Harvest is well below long-term sustainable levels.
- Investments in appropriate harvesting equipment can improve ability to manage this resource.

Resource Issues:

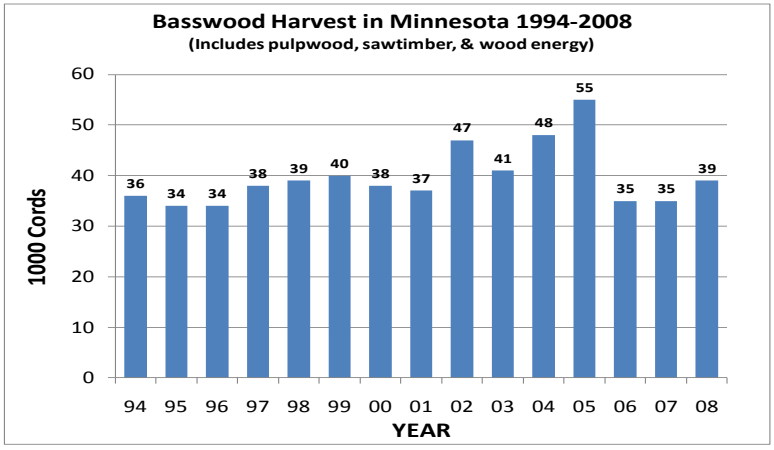
- Much of the maple resource is in private ownership, so managing it will require significant efforts in private landowner incentives and assistance.
- Different logging equipment and intensity of management required in multiple-entry management.



Source: 2009 FIA Database provided by USFS, Northern Research Station
Note: Tree grade 1 = highest quality in the USFS tree grading system

Minnesota's maple resource is made up of 4 species: sugar maple, red maple, silver maple and black maple. Sugar maple in much of Minnesota tends to be of fairly low sawlog quality, due to relatively small size and poor form. We are on the western edge of its natural growing range. Some higher quality sugar maple is grown in southeastern Minnesota, however.

Basswood



Source: NRS Pulpwood Surveys, DNR Sawmill & Fuelwood Surveys.

DNR estimated long-term annual sustainable harvest level = 280,300 cords. Based on the 2009 FIA database, estimated net annual basswood growth: 310,100 cords, estimated annual mortality: 88,100 cords.

Current Demand for Basswood from Minnesota Timberlands

	Cords
2008 Harvest	**38,900**
• Minnesota Pulpwood Industries	11,900
• Pulpwood Export (To Canada and Wisconsin)	900
• Sawlogs & Other	19,800
• Fuelwood	6,300

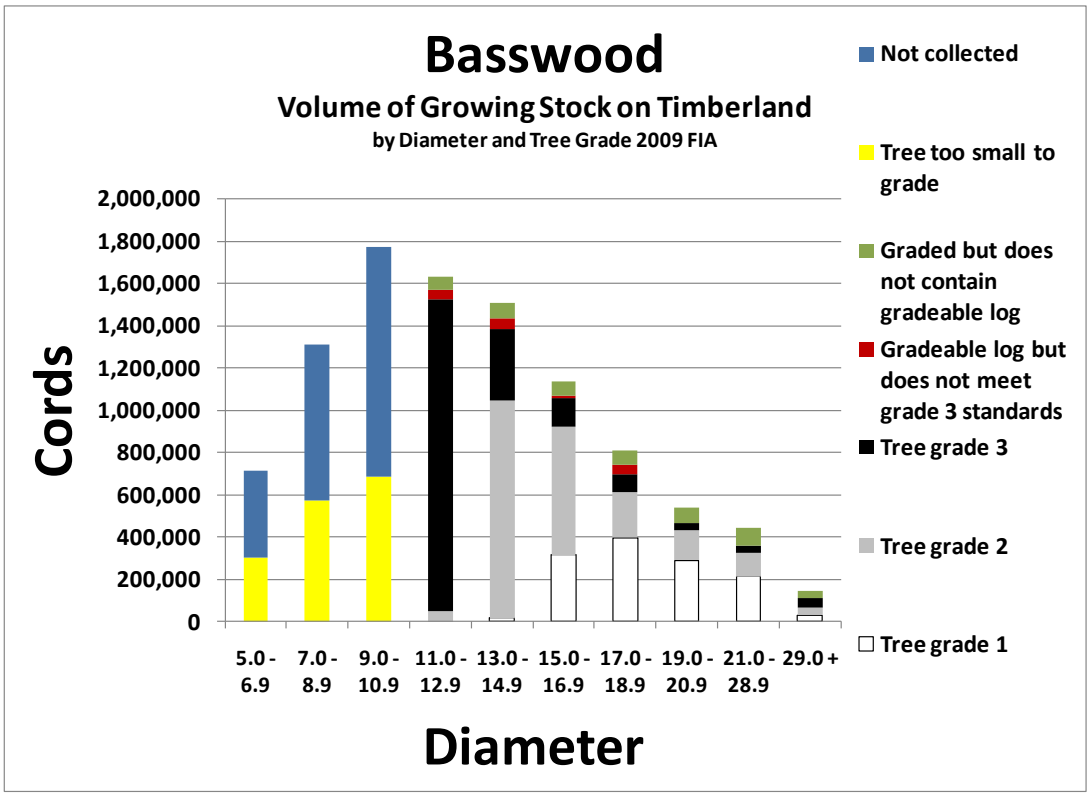
Source: NRS & DNR Surveys.

Resource Opportunities

- Harvest is well below long-term sustainable levels.
- There are opportunities to improve future basswood volume and quality through investments in intermediate stand treatments on private and public lands.
- Minnesota grows some of the highest quality basswood in the world. It can be a great fit for "craft" woods and other niche markets.

Resource Issues

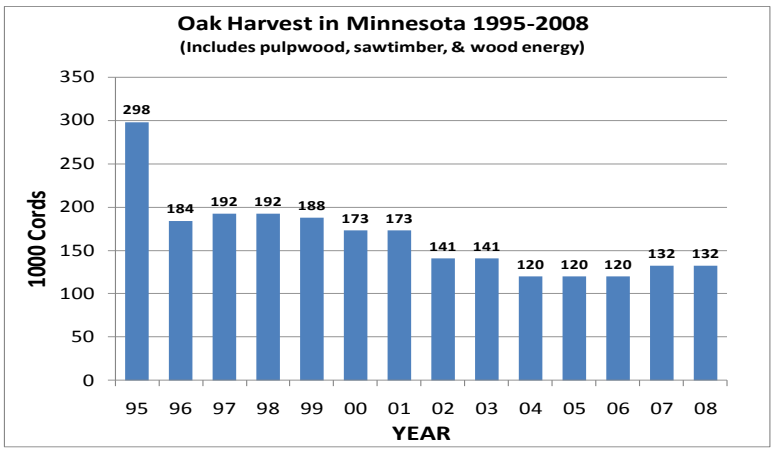
- Much of the basswood resource is in private ownership, so managing it will require significant efforts in private landowner incentives and assistance.
- Potential for harvest of high-quality stems as "pulpwood" on productive sites prior to their reaching sawlog size on private lands. Important to get quality material to higher-value markets.
- Different logging equipment and intensity of management required in multiple-entry management.



Source: 2009 FIA Database provided by USFS, Northern Research Station.
Note: Tree grade 1 = highest quality in the USFS tree grading system

Basswood is capable of producing a large percentage of high-quality sawlog and veneer material on good sites in Minnesota.

Minnesota's Oak Resource



Source: NRS Pulpwood Surveys, DNR Sawmill & Fuelwood Surveys.

The oak cover type is dominated by late "middle aged" stands (average rotation age = 80 to 100). The oak resource is largely owned by private landowners.

Current Demand for Oak from Minnesota Timberlands

	Cords
2008 Harvest	**131,800**
• Minnesota Pulpwood Industries	0
• Pulpwood Export (To Wisconsin)	100
• Sawlogs & Other	73,000
• Fuelwood	58,700

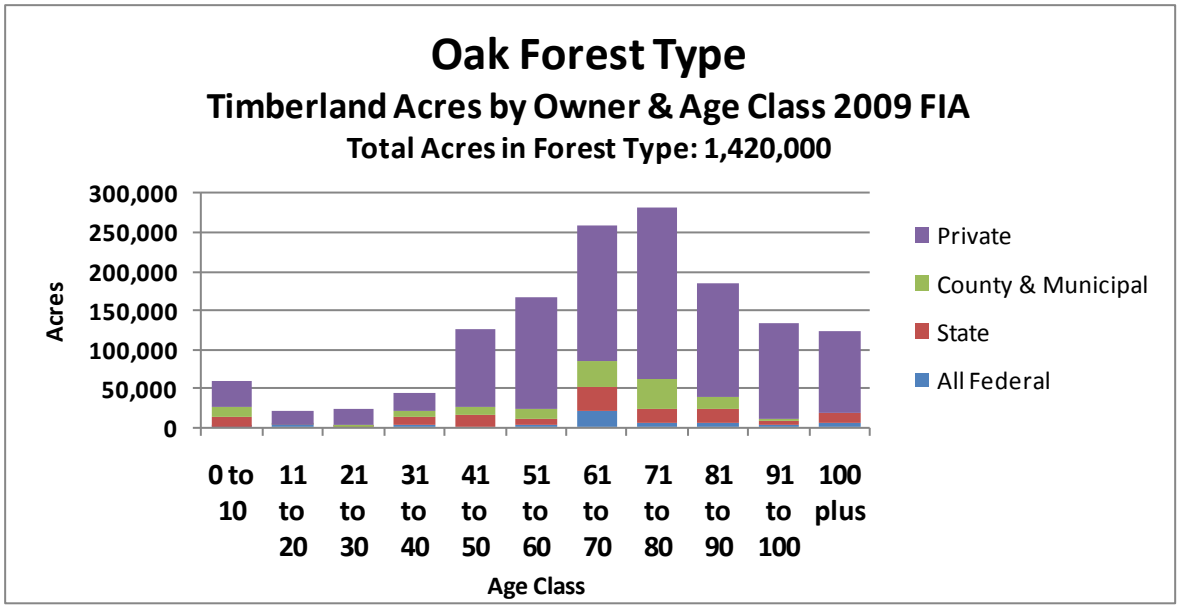
Source: NRS & DNR Surveys.

Resource Opportunities:

- Some high quality sawlog and veneer red oak is grown on good sites in Minnesota.
- There are opportunities to improve future oak volume and quality through investments in intermediate stand treatments on private and public lands.

Resource Issues:

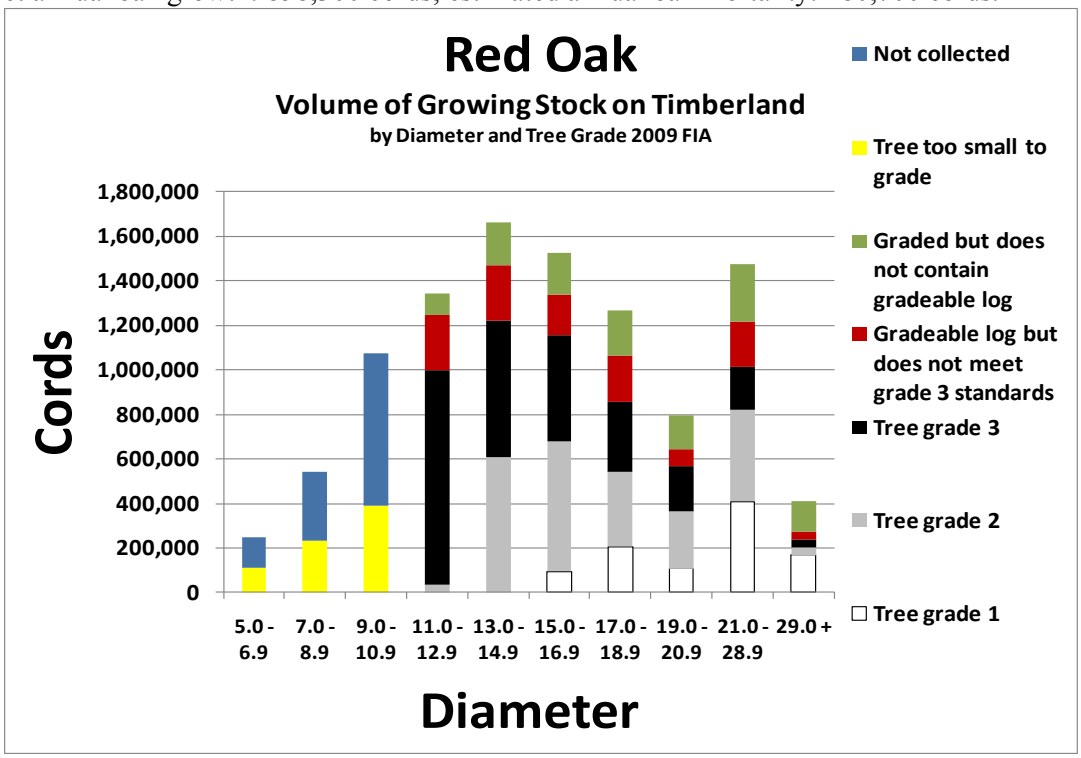
- High quality red oak sawlog resource continues to decline.
- Gypsy moth invasion making its way into MN will have a negative impact on oak resource.



Source: 2009 FIA Database provided by USFS, Northern Research Station

Oak is a tremendously important cover type and species in a large portion of Minnesota. Many wildlife species commonly use acorns as part of their diet, and oaks also can provide excellent den opportunities. Additionally, it is the largest volume species produced by many sawmills, especially those in the southern 2/3 of the state.

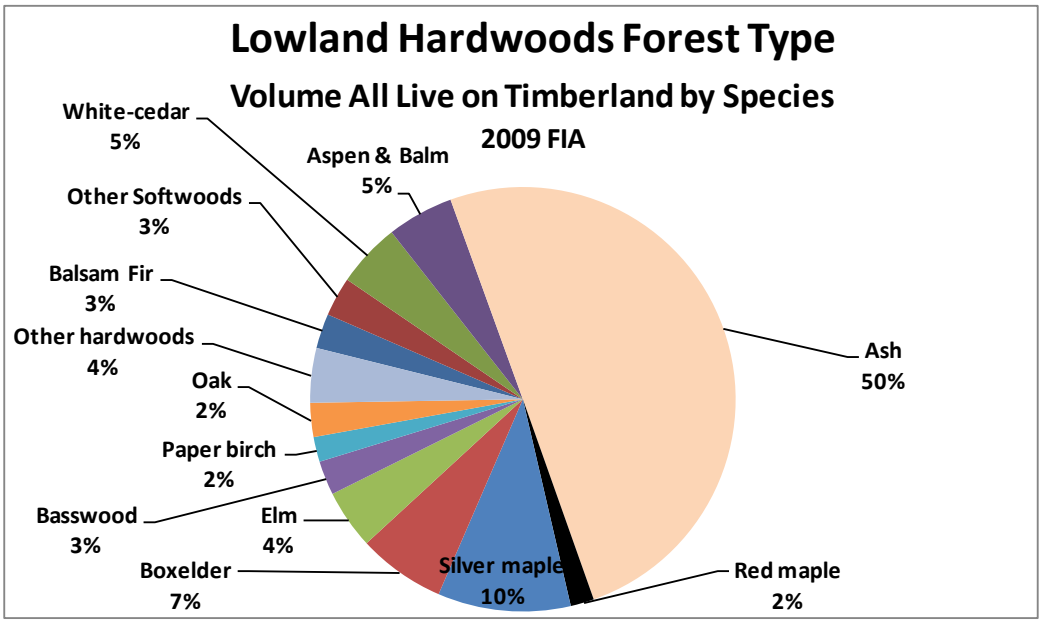
DNR estimated long-term annual sustainable harvest level for oak = 499,300 cords. Based on 2009 FIA data, estimated net annual oak growth: 858,300 cords; estimated annual oak mortality: 180,700 cords.



Source: 2009 FIA Database provided by USFS, Northern Research Station (includes black oak, northern pin oak, and northern red oak).
Note: Tree grade 1 = highest quality in the USFS tree grading system

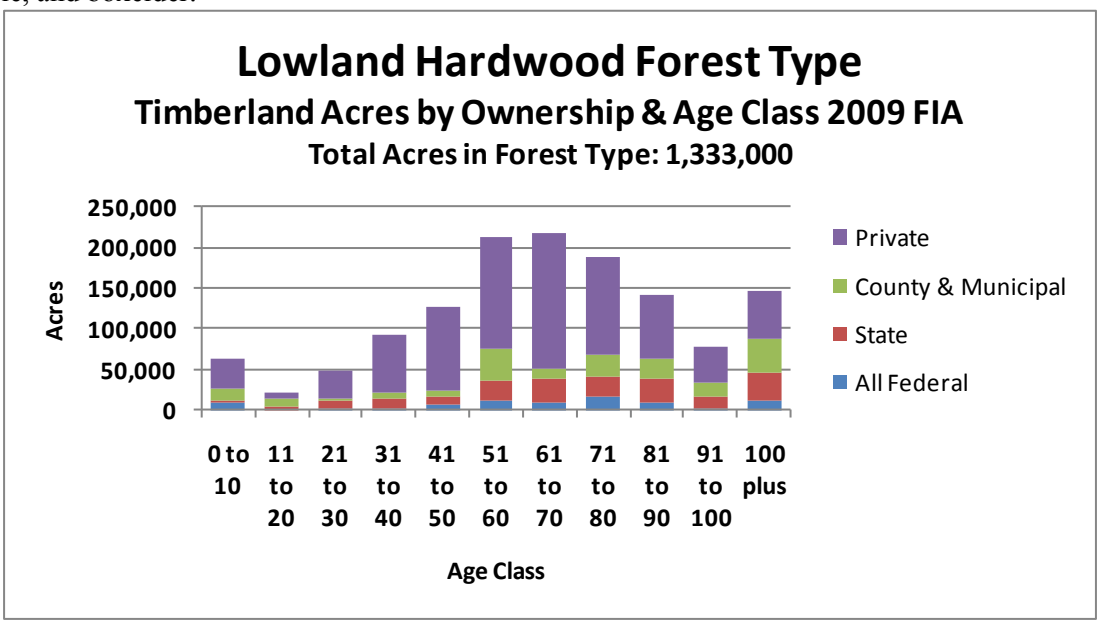
Some high quality sawlog and veneer red oak is grown on good sites in Minnesota.

Minnesota's Lowland Hardwoods Resource



Source: 2009 FIA Database provided by USFS, Northern Research Station

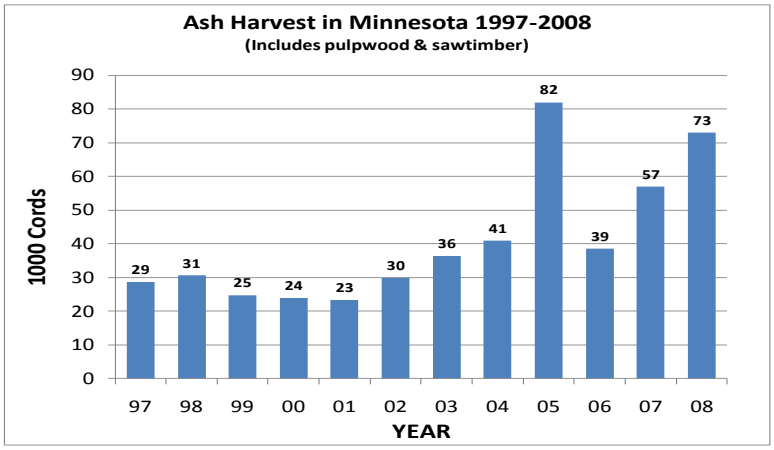
The lowland hardwoods cover type is made up of a variety of species. Most prevalent are black ash, green ash, silver maple, and boxelder.



Source: 2009 FIA Database provided by USFS, Northern Research Station

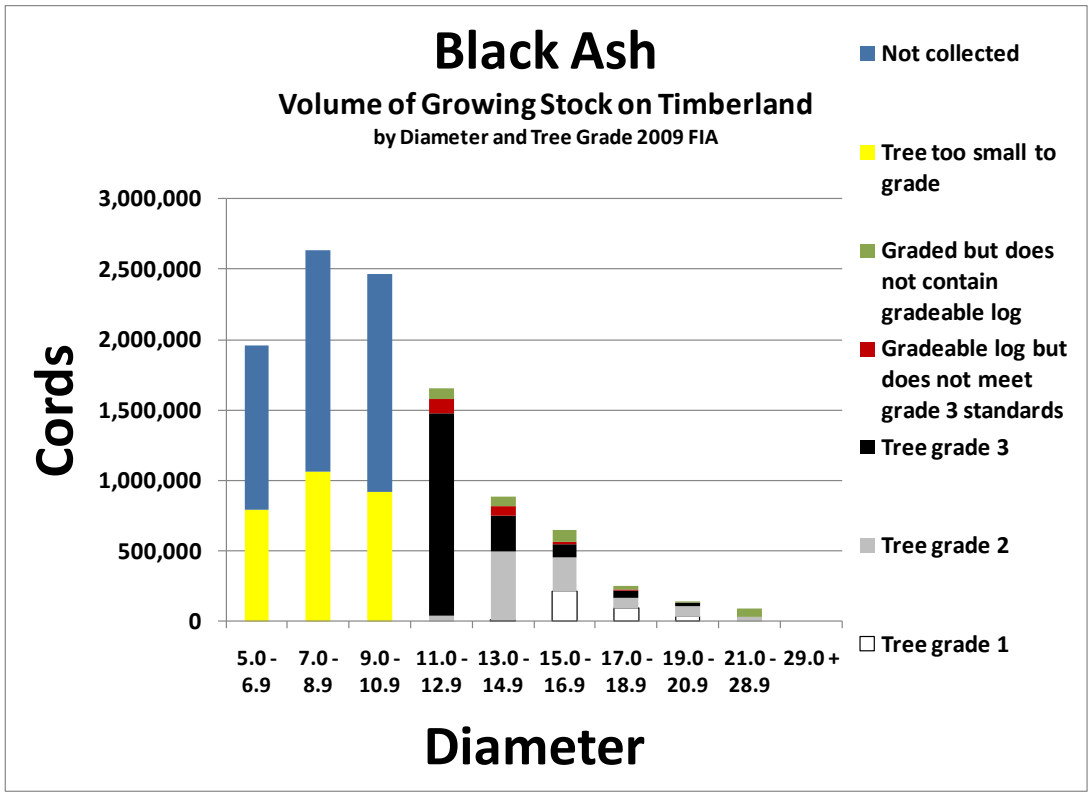
The lowland hardwood cover type is dominated by late "middle age" stands. A common rotation age for black ash is 90 years.

Minnesota's Ash Resource



Source: Harvest data compiled by USFS Northern Research Station & DNR

Ash has not had a pulpwood market until recently, when several mills began using it. DNR estimated long-term annual sustainable harvest level for ash = 353,600 cords. Based on 2009 FIA data, estimated net annual ash growth: 547,800 cords; estimated annual mortality: 151,600 cords.



Source: 2009 FIA Database provided by USFS, Northern Research Station

Of the ash species found in Minnesota (black, green and white) black ash has by far the largest volume. Minnesota's ash resource is dominated by smaller diameter material. This has an impact on processing opportunities: specifically, much of the ash resource is a good fit for pulpwood mills. A modest amount of high quality sawlog and veneer ash is grown in Minnesota.

Current Demand for Ash from Minnesota Timberlands

	Cords
2008 Harvest	**73,400**
• Minnesota Pulpwood Industries	23,800
• Pulpwood Export (To Canada)	1,300
• Sawlogs & Other (including fuel)	48,300

Source: NRS & DNR Surveys.

Resource Opportunities

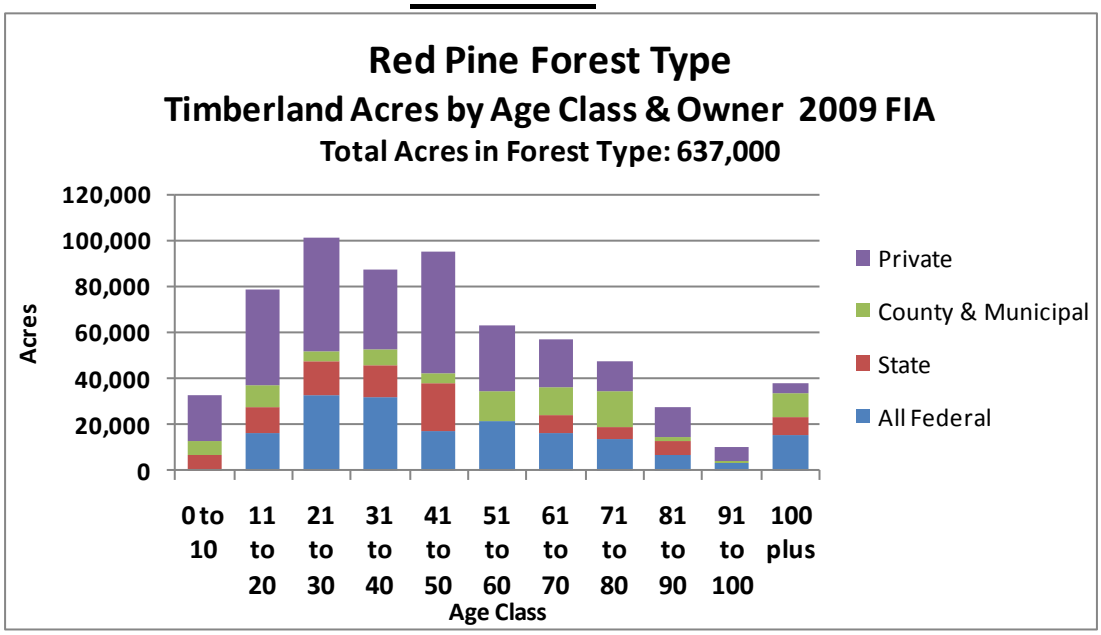
- Harvest is well below long-term sustainable levels.

Resource Issues

- Serious health concerns in black ash.
- Sorting high quality ash for highest value markets.
- Invasive Emerald Ash Borer found in Minnesota.

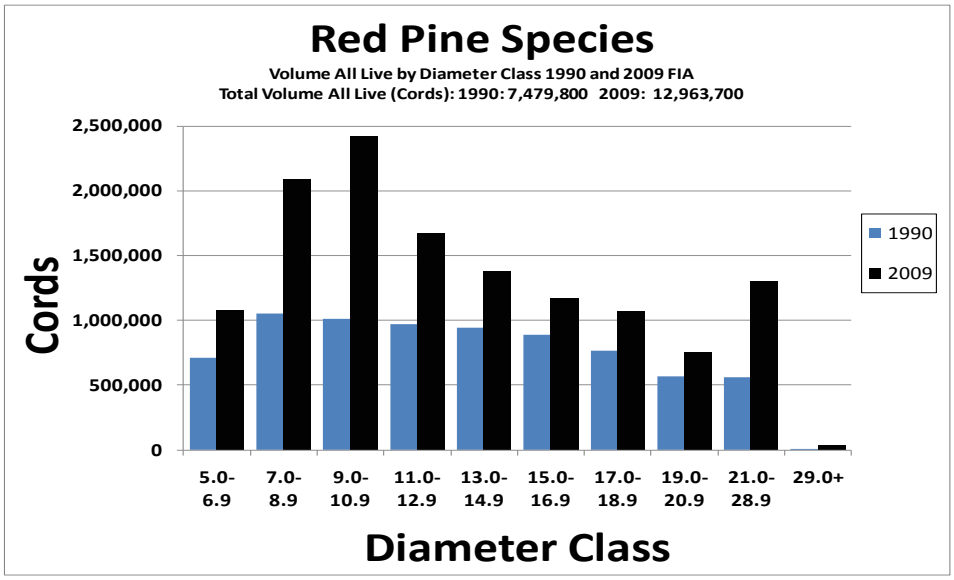
Minnesota's Pine Resource

Red Pine



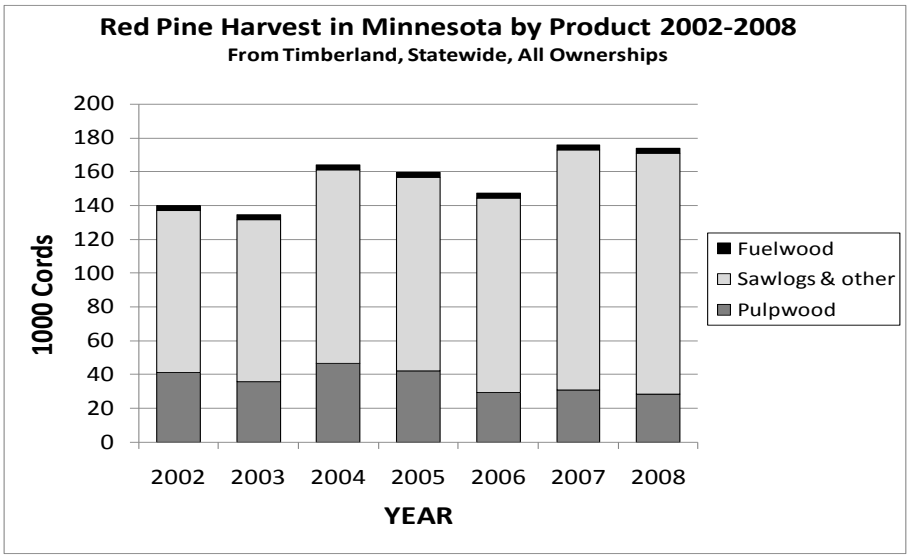
Source: 2009 FIA Database provided by USFS, Northern Research Station

Red pine is a type dominated by young age classes, much of which is in the form of plantations in need of periodic thinning. Much of the resource is owned by the federal government and private landowners.



Source: FIA Database provided by USFS, Northern Research Station

Volume of red pine has increased greatly since 1990 as many plantations have reached merchantable sizes.



Source: Harvest data compiled by NRS & DNR

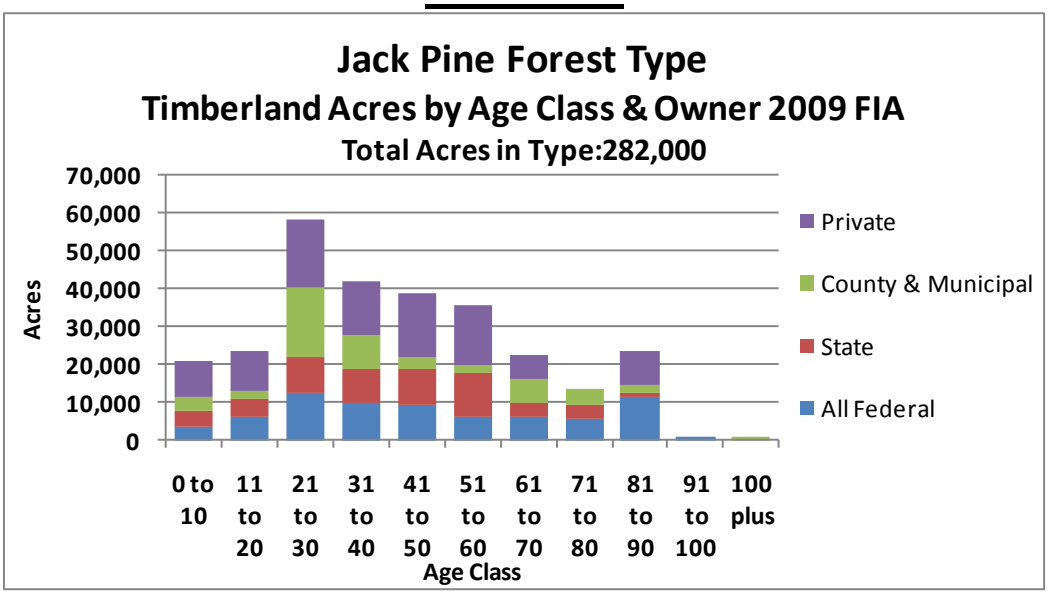
DNR estimated long-term annual all-ownership sustainable harvest level is approximately 345,000 cords*. Based on 2009 FIA data, average net annual growth of red pine growing stock: 655,000 cords; average annual mortality: 26,300 cords.

* Short-term sustainable level of 345,000 cords will continue to rise for at least 30 years as the cover type ages and available volume for thinning increases. Also: intensified thinnings present an additional opportunity to raise sustainable levels by providing added stand growth.

Resource Opportunities

- Many red pine stands are moving into size classes that will benefit from additional thinning.

Jack Pine

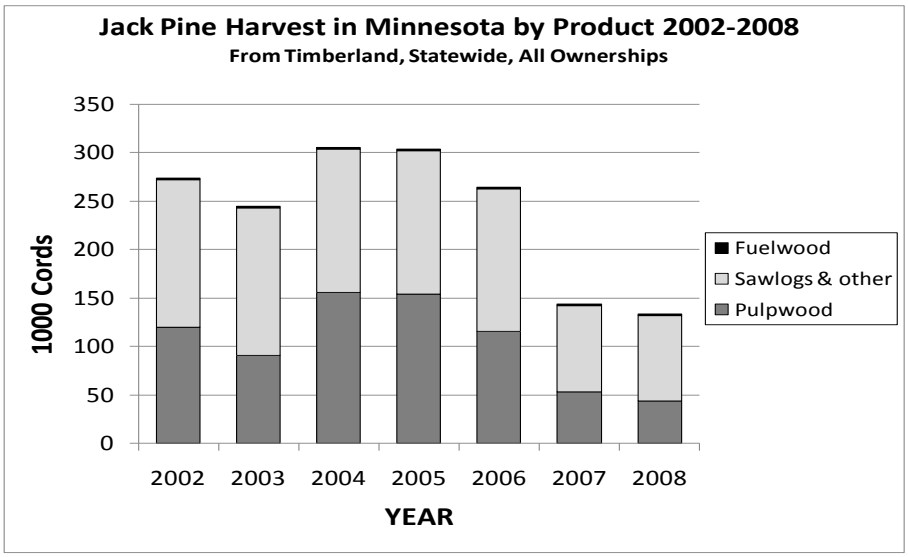


Source: 2009 FIA Database provided by USFS, Northern Research Station

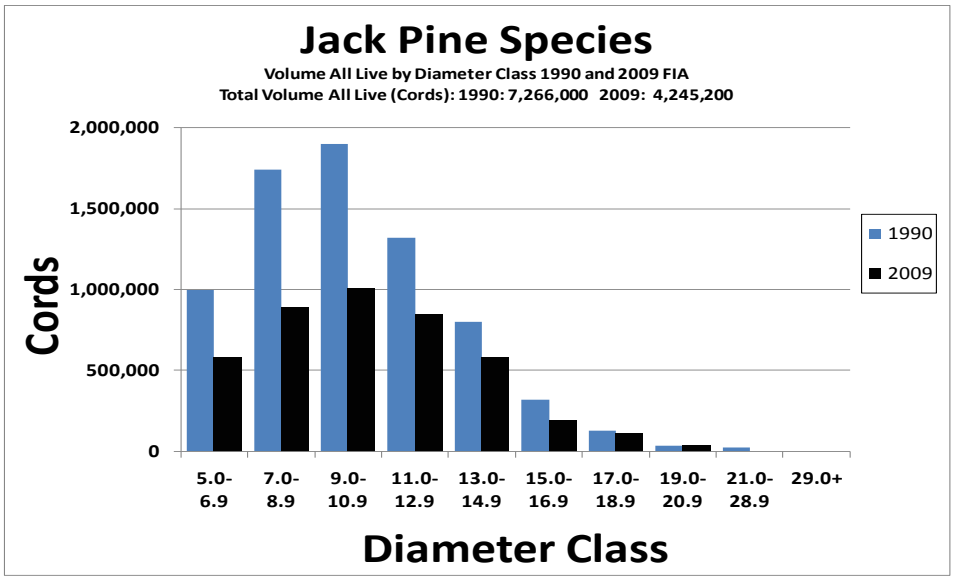
Ownership of the jack pine resource is well-distributed between the major ownership groups. Private landowners control the largest total acreage, but the federal government has by far the largest resource as a proportion of its total ownership. The jack pine cover type is heavily weighted to the 21 to 60 year age classes. Many stands over age 50 are in need of management at the present time. Periodic jack pine budworm outbreaks occur in older stands, which can result in heavy mortality.

The accelerated harvest rates of the mid-2000s were necessary and prudent for forest health management purposes, but they were not sustainable for the long term. Jack pine harvest levels recently began a downward trend. The volume "slack" caused by the reduction in jack pine can be made up with increased thinning of the young red pine resource.

Based on 2009 USFS FIA data, average net annual growth of jack pine growing stock: 106,100 cords; average annual mortality of jack pine growing stock: 99,900 cords.



Source: Harvest data compiled by NRS & DNR

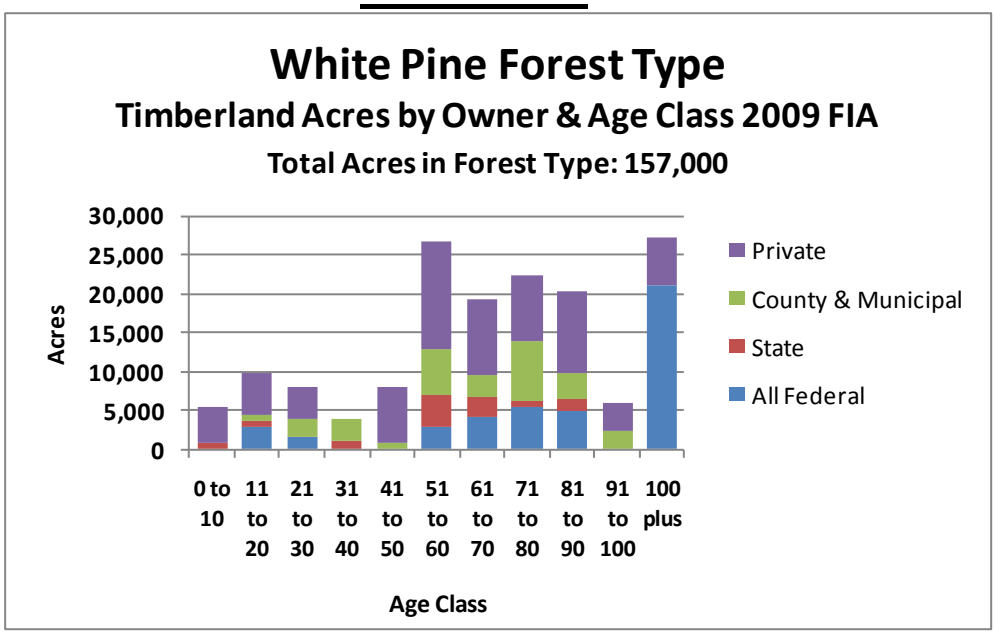


Source: FIA Database provided by USFS, Northern Research Station

Jack pine total volume of all live has declined from 7,266,000 cords in 1990 to 4,245,200 cords in 2009 – a 42% decrease.

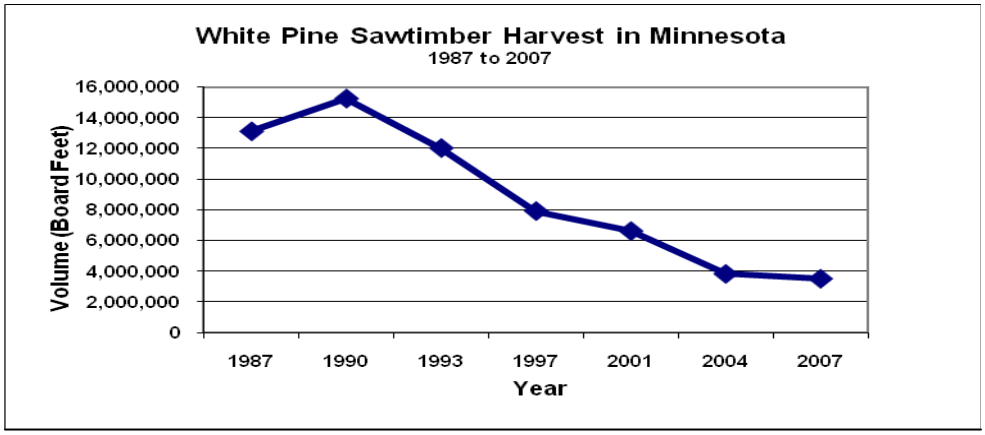
The vast majority of jack pine volume is found in trees with diameters under 15 inches.

White Pine



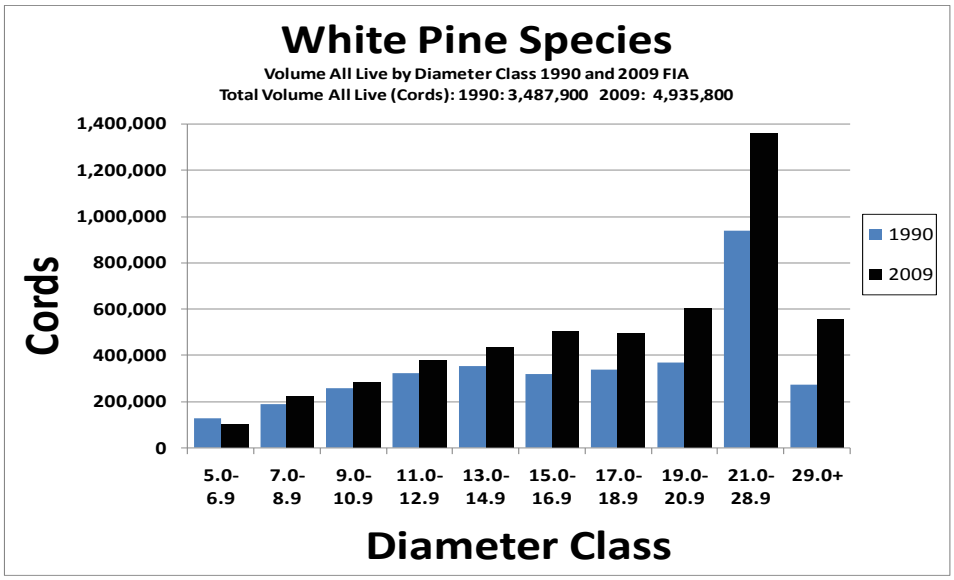
Source: 2009 FIA Database provided by USFS, Northern Research Station

The cover type is heavily weighted to age classes of 60 years plus. National forests and private landowners are by far the predominant ownership groups for the white pine cover type.



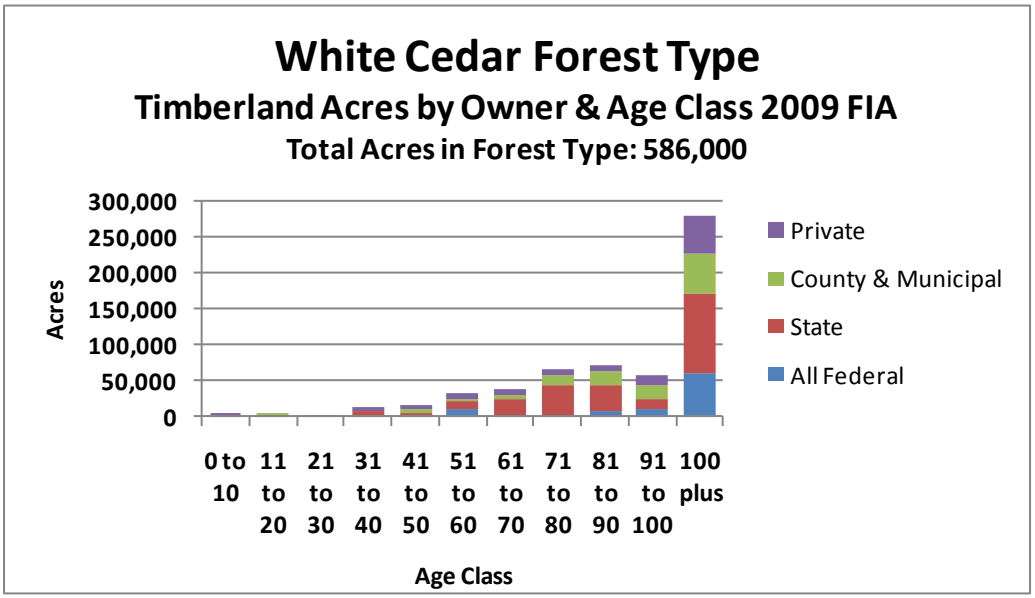
Source: DNR – Division of Forestry Sawmill Surveys

Most white pine volume occurs in the white pine, red pine, aspen and northern hardwoods cover types. The vast majority of white pine volume is in trees with diameters greater than 15 inches. Volume has increased substantially since the 1990 inventory. Based on 2009 FIA data, average net annual growth of white pine growing stock: 176,600 cords; average annual mortality: 36,900 cords.



Source: FIA Database provided by USFS, Northern Research Station

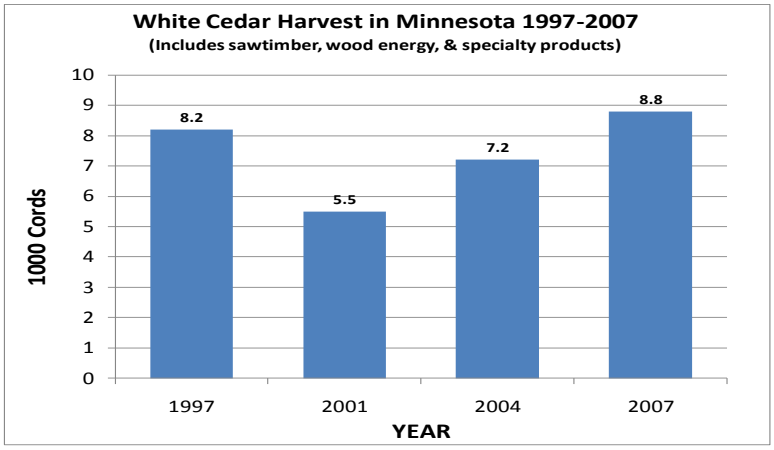
Minnesota's White Cedar Resource



Source: 2009 FIA Database provided by USFS, Northern Research Station

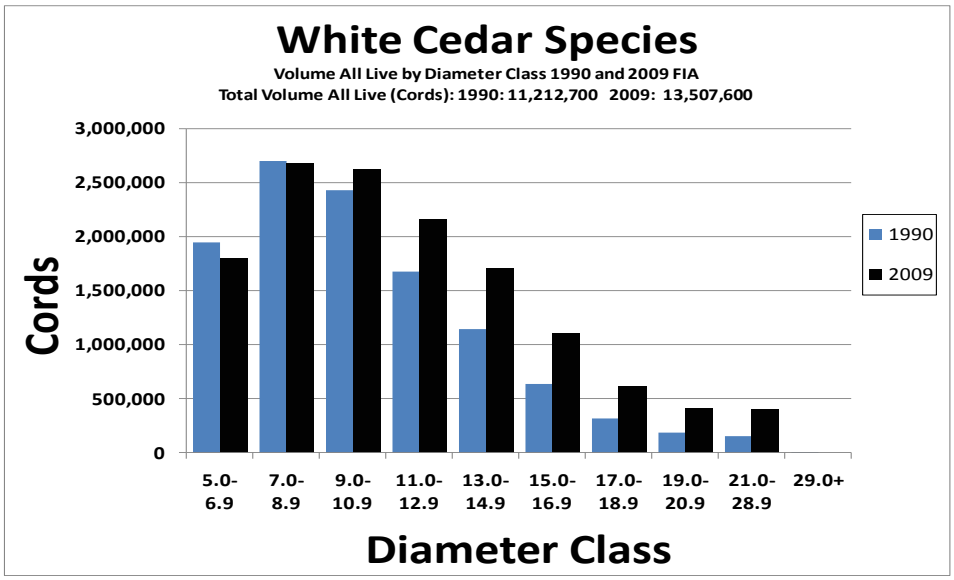
Northern white cedar is a slow-growing, long-lived conifer. The white cedar cover type in Minnesota is located largely in the northeastern 1/3 of the state and is made up of a variety of species. Cover type volume is dominated by white cedar, but includes spruce, tamarack, balsam fir, birch, ash and several other minor species. Significant volumes of cedar can also be found mixed with other lowland cover types and it also exists as a minor component of some upland cover types. Cedar is significant because it provides critical habitat for white-tailed deer and for many rare plant species including the threatened ram's head orchid, and because it is a potentially valuable timber resource.

White cedar is generally an old resource, and it is getting older: over 278,000 cover type acres exist in stands over age 100, with less than 13,000 cover type acres below age 30. Much of the white cedar resource exists on very wet sites, many of which have low productivity and slow growth. High amounts of heart rot are common in older stands on wet sites. Much of the volume of white cedar is contained in material below 13 inches in diameter.



Source: USFS Pulpwood Surveys, MN DNR Sawmill & Fuelwood Surveys.

With no pulpwood market for cedar, the small amount of utilization is entirely for sawtimber, specialty products and a small amount of fuelwood. Net annual growth for white cedar growing stock is approximately 261,600 cords, and average annual mortality is approximately 53,000 cords, according to the 2009 FIA inventory. Annual harvest is less than 9,000 cords, so there is a great deal of potential in the resource for more utilization and management, if regeneration issues can be solved.



Source: FIA Database provided by USFS, Northern Research Station

Resource Opportunities:

- Cedar can be a great fit for some high-value products due to its natural decay resistance.

Resource Issues

- White cedar has been somewhat of a "neglected" resource for many years. Probably the single biggest reason for this is an inability to consistently regenerate it on many sites. Cedar is in need of greater research efforts in regeneration techniques.
- Use of white cedar for industrial products is very modest. There is no pulpwood market for cedar. The modest amount of utilization in Minnesota is entirely for sawtimber, specialty products and a small amount for fuelwood.
- Cedar has tremendous importance for wildlife habitat and ecological diversity.
- Cedar is very long-lived, but doesn't often regenerate naturally

Timber Price Information

$$$$

Average Prices Received by product for Stumpage Sold by Public Land Agencies in Minnesota: 2000-2009

Average Prices Received for Stumpage Sold by Public Land Agencies in Minnesota: 2000-2009

Notes:

- Average prices based on those reported by Minnesota Counties (Aitkin, Becker, Beltrami, Carlton, Cass, Clearwater, Crow Wing, Hubbard, Itasca, Koochiching, Lake, Pine, and St. Louis), USDA Chippewa and Superior National Forests, USDI Bureau of Indian Affairs, and Minnesota DNR- Division of Forestry. Agency specific prices are available on the DNR website, in the annual "Minnesota Public Stumpage Price Review" at http://www.dnr.state.mn.us/forestry/timbersales/stumpage.html
- Reporting agencies have different fiscal years and different product specifications. Some agencies report their data based on appraised volume estimates, others report based on actual scale receipts. All prices presented as reported.
- The reported sales data includes numerous different products and units of measure. Conversion factors used: 500 BF/ Cd for hardwoods, 400 BF/ Cd for softwoods.
- Use caution when comparing prices shown in these tables with actual prices received or expected on any specific timber sale. For recent timber stumpage prices, readers can go to the DNR website and view recent auction results at http://www.dnr.state.mn.us/forestry/timbersales/index.html.

Pulpwood ($ per cord)										
Species	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**
Aspen	25.28	28.76	27.36	28.95	37.20	59.70	47.52	27.50	26.14	23.07
Balm	25.27	32.06	27.53	25.12	31.71	45.25	38.85	17.00	21.18	20.83
Birch	7.69	8.31	8.16	9.04	12.21	20.57	14.76	9.68	9.06	9.17
Ash	4.09	3.91	5.86	3.62	5.51	5.43	8.22	6.21	6.86	8.73
Oak	9.27	7.74	5.77	4.35	8.28	16.28	18.27	16.23	8.39	15.32
Basswood	5.68	5.48	6.51	6.05	6.58	10.64	8.06	10.35	7.41	8.10
Balsam Fir	14.84	14.61	13.99	13.46	21.12	33.54	30.56	18.36	15.98	14.67
W. Spruce	32.63	29.90	30.51	21.87	31.80	43.39	35.06*	21.49	18.69*	17.44*
B. Spruce	22.23	29.17	27.05	31.96	31.50	43.39	35.06*	21.49	20.05	
Tamarack	5.67	6.40	4.11	4.56	6.42	9.84	5.96	3.18	4.61	5.01
W. Cedar	8.46	6.74	7.06	4.68	4.60	5.50	9.26	6.39	4.10	5.44
J. Pine	21.94	21.63	22.18	21.37	29.46	30.66	37.62	28.50	9.87	13.02
R&W Pine	18.61	20.79	20.99	19.55	19.18	29.06	36.59	27.15	11.99	16.22
Maple	---	---	---	---	---	13.30	7.98	7.91	8.86	8.06
---Insufficient data. * Spruce Species										

Pulp & Bolts in Combination* ($ per cord)										
Species	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**
Aspen	28.66	34.33	30.80	34.52	40.94	65.14	45.58	28.44	37.63	36.79
Balm	25.41	32.57	28.35	28.21	34.15	47.09	34.73	23.70	---	---
Birch	9.45	10.40	10.18	12.61	16.28	24.99	17.70	10.99	16.30	13.01
Ash	10.01	11.52	10.01	9.84	13.42	21.76	12.98	7.65	20.96	10.10
Oak	25.35	24.33	32.32	34.50	26.26	42.24	25.47	20.85	22.12	21.25
Basswood	17.00	18.87	16.94	18.34	19.46	23.89	18.21	10.98	16.87	11.62
Balsam Fir	19.87	24.01	20.53	23.04	26.76	41.38	30.57	21.47	22.77	21.91
W. Spruce	34.25	33.84	34.88	35.86	41.67	48.03	31.38	30.29	28.82	23.37*
B. Spruce	23.04	30.01	27.65	31.96	32.88	48.03	31.38	30.29	---	
Tamarack	6.60	7.37	4.55	5.21	6.96	10.07	9.31	5.40	---	---
W. Cedar	8.32	8.68	7.91	6.16	5.98	7.47	13.48	9.35	13.98	11.65
J. Pine	30.39	37.95	36.76	38.20	41.75	50.81	49.49	32.07	30.28	25.41
R&W Pine	53.35	43.89	40.01	39.13	39.76	55.17	45.98	33.52	27.51	29.32
Maple	---	---	---	---	---	16.30	12.36	8.30	17.59	16.59

*A bolt is defined as a short log, usually 100" length, with a specific minimum top diameter, generally sawn for lumber.

* Spruce Species

---Insufficient data.

Sawtimber ($ per Thousand Board Feet)*										
Species	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**
Aspen	102.28	114.11	103.19	109.91	128.77	190.44	---	---	43.64	51.11
Birch	43.17	50.48	55.87	72.34	94.41	128.30	52.06	27.24	32.04	19.82
Ash	71.39	81.97	66.85	76.60	99.56	144.62	---	38.21	42.41	51.89
Elm	---	44.10	69.00	62.08	53.82	86.52	---	85.22	60.08	53.99
Oak**	109.53	118.72	151.77	150.04	145.57	185.90	378.03	182.83	271.04	193.61
Basswood	70.25	81.24	80.43	94.47	112.30	133.10	124.73	97.73	97.33	66.24
Balsam Fir	120.65	144.20	136.32	145.47	167.74	244.43	---	76.47	72.75	58.34
Spruce	90.00	91.27	94.95	101.81	131.34	204.73	113.02	96.41	81.57	87.05
W. Cedar	19.96	30.46	29.43	24.73	27.34	26.38	153.14	---	---	---
J. Pine	114.86	154.35	155.76	135.43	168.66	184.79	124.11	115.21	109.95	106.19
R&W Pine	176.01	170.13	153.78	153.10	139.41	181.21	143.45	114.04	119.51	107.40
Maple	---	---	---	---	---	131.53	206.45	137.17	150.62	81.48

*Includes veneer for certain hardwood species.

**Primarily from public lands in Southeastern Minnesota.

---Insufficient data.

Glossary

BIA – Bureau of Indian Affairs

Cover Type - A classification of forest land based on the species forming a plurality of live tree stocking.

CSA – Cooperative Stand Assessment. This is the inventory system used on state-owned land. Different vegetative stands are mapped using aerial photography and ground checks. Variable radius sample plots are distributed throughout each cover type and measured on the ground. A variety of information on stand condition is collected. Things like timber volumes, species mixes and insect and disease damage for the state forest and wildlife management areas can be determined using CSA data.

Cull – Portions of a tree that are unusable for industrial wood products because of rot, form, missing or dead material, or other defect.

FIA – Forest Inventory & Analysis. In this inventory, permanent plots are remeasured. Under an older system, where all existing FIA plots were measured during the same year, field remeasurements were last completed in 1977 and 1990. A new system is now used. Rather than measuring all plots during one year, basically 20% of all plots are remeasured annually, referred to as a panel. Hence, all existing plots are remeasured during a five-year period, referred to as a cycle. Two complete cycles have been completed, Cycle 12 (panels of 1999, 2000, 2001, 2002, and 2003) and Cycle 13 (panels of 2004, 2005, 2006, 2007, and 2008). Minnesota has recently completed the first panel of the third five-year cycle in an effort to update its FIA, which is a cooperative effort between the USDA Forest Service and Minnesota DNR.

FIA provides extremely important information on the condition of the forest resource. Things like timber volumes, species mixes, and changes to the forest resource over time can all be determined using FIA data. It is the only way to track condition and changes over time for non-industrial private woodlands and is the only way to get comprehensive data across all ownerships.

Growing Stock Trees – Live trees of commercial species excluding cull trees.

MAI – Mean Annual Increment. The average annual increase in volume of a stand at a specified point in time. MAI changes with different growth phases in a tree's life, generally being highest in the middle ages & decreasing with age. The point at which MAI peaks is sometimes used as a guide to identify biological maturity and a stand's readiness for harvesting.

NRS – Northern Research Station. This is where the FIA unit of the USFS is located. These are the folks that, in cooperation with state DNR, accomplish the FIA inventory and Timber Product Output surveys. Without them, very little of the information in this book would be available.

NIPF – Non-Industrial Private Forest Land. Forest land owned privately by people or groups not involved in forest industry.

Primary Forest Industry Manufacturers – Refers to initial processors of trees, including producers of 1. Solid wood products (lumber, veneer), 2. Engineered wood products, 3. Pulp and paper, 4. Specialty products, and 5. Wood energy. These primary products are often inputs into "secondary" or "value-added" products.

Glossary (continued)

Pulpwood – Wood that is harvested and used by primary mills that make products from reconstituted wood fiber. In addition to wood pulp, this includes particleboard and engineered lumber products made from chips, shavings, wafers, flakes, strands and sawdust.

Rotation Age - Age at which a stand is generally considered mature and ready for harvest.

Sawtimber - Wood that is harvested and used by sawmills.

Secondary Forest Industry Manufacturers – Are those that use inputs from primary industry such as lumber to further process or manufacture "value-added" products such as cabinets, pallets and many others.

Stumpage – The amount paid for the right to cut and remove specified standing timber.

Timberland – Forest land that is producing, or is capable of producing, more than 20 cubic feet per acre per year of industrial wood crops, that is not withdrawn from timber utilization by policy or law.

USDA – United States Department of Agriculture.

USFS – United States Forest Service.

Conversion Factors

Conversion factors used in the preparation of this report:

1 cord = 500 board feet
1 cord = 79 cubic feet