

Northwest Woodlands

A Publication of the Oregon Small Woodlands, Washington Farm Forestry, Idaho Forest Owners & Montana Forest Owners Associations

NEW CENTURY FOREST PRODUCTS

**Opportunities for the Family
Forestland Owner**

**Nature and
Resource-based
Tourism**

**Lifestyle Forest
Owners Look to All
Values of the Forest**

**Forest Industry
Directory
Matches Buyers
and Sellers**



**NEXT ISSUE . . .
The Future of
Family Forests**

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Amelia Island Plantation Resort, a resource-based tourism venture in Florida, includes sunken forest trails, bike trail and tram stop with ecological prompt. Photo courtesy of Art Foster. Flower photo courtesy of James R. Freed.

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New Century Forest Products: Opportunities for the Family Forestland Owner

By **TOM NYGREN**

Family forestland owners (FFLOs) can see the handwriting on the wall. While there will probably always be a market for their Douglas-fir logs, the commodity price they receive will be dependent on many factors over which they have no control:



- as the “supply of last resort” for industrial operations, FFLOs may not receive the most favorable offers;
- as the national commodity market goes, so goes their stumpage value;
- as the number of mills shrink, there is less competition for their wood and haul distances are longer.

Clearly, the future for FFLOs is not in the past and relying almost totally on a commodity market. The future lies in recognizing and taking advantage of all the resources in their forest.

What resources—and what markets?

Three general types of markets are important to family forest owners: traditional, non-traditional and non-timber.

Traditional wood products markets are based on commodities that are wide-



PHOTO COURTESY OF TOM NYGREN

This madrone is destined for flooring and a counter-top in a recreation room. Niche products such as madrone may require special treatment to preserve their value for the market, such as painting the end of the log with a compound to prevent checking and splitting. Bonnie Shumaker of Washington County is shown converting what would have been firewood to high-value flooring.

ly used and consumed. The common traditional wood markets are dimension lumber, veneer, pulp, poles and export.

Non-traditional wood product markets are primarily dependent on their unique characteristics such as species; size; wood characteristics such as density, grain and color; and niche markets.

Non-timber products and values are useful and in demand by society completely apart from any wood product

value. These include decorative materials such as greenery; shade-loving plants and foraging crops such as ferns, mushrooms and herbs; experiences, such as recreation (see accompanying article describing eco-tourism opportunities); and agroforestry opportunities.

How do I know if these opportunities exist?

Most FFLOs have a basic under-



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standing of traditional markets. Non-traditional and non-timber products and values require a similar level of understanding. Listed below are some points to consider.

- Study what the markets want, including species, quality parameters, specific characteristics, and predictability of quality and supply.
- Learn how to inventory for these products and/or values.
- Determine the potential to create the product or value if it doesn't already exist and how to keep it sustainable.
- Examine the operability of harvesting the product or using the value.
- Is there an accessible market?
- How competitive is my product/value in the marketplace?
- Will the income from pursuing these opportunities pay for the time,

such as monetary policies, housing starts, import/export regulations and building material trends are the primary determinants of broad market changes.

Within any particular product or value market, specific trends or fluctuations also exist, such as when innovative new products replace an "old standard." The replacement of the plywood market in large part by oriented strand board—relying on different processes and even different species—is an example.

The market is very responsive to cost factors. As a result, labor, equipment, maintenance and transportation costs all along the conversion chain from raw material to end-user drive the prices that can be paid for raw material—the products from the forest.

FFLOs may seem to be at the complete mercy of market and cost factors.

After all, what effect can the small amount of product from one forestland owner have on markets or costs? However, the apparent weakness of size and lack of established market mechanisms can yield competitive advantages.

Competitive advantages for the FFLO

The key is capitalizing on FFLO characteristics such as intimate knowledge of the product, flexibility in operations and cost control through personal involvement. FFLOs can find niches and opportunities that larger owners would not find economic or might overlook. Small firms may want to work directly with an FFLO and thus



PHOTO COURTESY OF TOM INVGREN

A portable mill can be very useful in converting a log to a product valued in a niche or non-traditional market, such as beams used in many new homes for their rustic effect or furniture blanks for secondary processing. Lyal Purinton uses his mill to convert some of his Washington County trees to products, as well as for custom work for other family forest owners.

equipment and other costs of utilizing them?

Factors affecting small woodland markets

Markets for traditional, non-traditional and non-timber products and values are all susceptible to broad market changes and implications at the national and international levels. Factors

Top Ten Marketing Tips

1. Know your product(s)—how much you have and its quality.
2. Know the markets and possibilities.
3. Select your target markets and match your products with the markets.
4. Do your homework. Understand the economics of producing the products.
5. Open the lines of communication with market experts, family forest owners and others.
6. Build a business plan and include short- and long-term goals, and how-to-dos.
7. Meet the marketers: Make and maintain market contacts.
8. Demonstrate product reliability, including amount, timing and quality.
9. Be business-like in all your contacts, record-keeping and correspondence.
10. Innovate and adapt.

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Business and Wood Products Trends that Affect Markets and Family Forest Owners

1. Globalization—the world has shrunk, look for international markets, and anticipate the affect of them on traditional products.
2. Market niches—small is beautiful...and profitable!
3. Value-added is where the profit is. Can you find a way to “move up” the product process chain?
4. Integrated operations provide increased efficiency; get the most out of your forestland by marketing all possible products.
5. Sustainability is important to consumers—relating your good management to your products increases market options and product value.
6. Growth in engineered wood products processing sector. Technological advances in glues and lamination have spurred the increasing use of engineered wood, along with decreasing availability of high-strength construction wood at competitive prices.
7. Under-the-radar business enterprises—includes business enterprises targeted at specific markets, such as trends toward organic food products, energy efficiency, and antique or historically significant furniture.

bypass the middleman.

Examples of these FFLO niches and opportunities flow from some basic questions outlined below.

What species are attractive on the market? Particular characteristics of a species for a consumer or construction product or a successful marketing strategy can be used to your advantage. The Northwest has many hardwood species that have potential value for the right market. For example, Oregon white oak is used for wine casks, flooring and furniture; and red alder is used in the cabinet and furniture industry.

The *competitive advantage for FFLOs* lies in their ability to include minor species within their management strategy and to provide the small quantities of a particular species that the market may desire.

I have this defective (unusual, rare, distinguished, atypical, striking) wood—what can I do with it? Markets can be created for the unusual, different and even bizarre types of wood or other forest product found on your woodland. “Denim pine” is simply bug-killed timber with a distinctive coloring from blue-stain fungus. Once shunned by traditional markets, denim pine is now sought by a segment of the

log home market. “Pecky cypress” is another example of using a previously defective material to create a new market. How about developing a new name and market for wormy cedar? Other examples include various growth defects such as burls, spiral or wavy growth rings, or twisted stems that can be used for decorative columns or sculpture.

Creating new markets is not limited to wood products. Shrubs, herbs, old bird’s nests for decoration or crafts, unusual or especially scenic woodland settings, nuts and berries can become cash opportunities for the FFLO.

The *competitive advantage for FFLOs* is the ability to match products to specific niches in the market—something that large landowners might find outside their business goals.

But I only have a small amount—how can small amounts be marketed? When a small amount of product is projected, the FFLO can seek a traditional market that will accept the amount, look for portable mills or mills that process for a limited market, or work with other landowners to “package” wood from a number of FFLOs. Log sort yards are a potential option to aggregate small amounts

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from FFLOs into a more marketable quantity.

A good example of finding a market for small quantities comes from Vermont, where FFLOs have found a use for “ash butts”—the four-foot-long sections of ash trees cut during precommercial thinning. The butts are shipped to Ireland, where they are used to make “hurleys”—a 36-inch long stick used in the traditional sport of hurling. It’s a small market, but still consumes enough Vermont ash butts to make 150,000 hurleys a year! This example demonstrates the value of information: One must first be aware that such a product exists, then the specifications (wood species, lengths, widths, etc.) and then who the buyers are.

The *competitive advantage for FFLOs* is the flexibility to seek a variety of small market options that best meet their product situation.

My trees are too small/large/etc.—How can I find “market fits?” The “revolution” in log processing over the last 20 years has created many problems for FFLOs. Large logs over 30 inches in diameter are not welcome at all mills or are discounted. FFLOs can seek non-commodity markets, such as those that require tight grain or large size, and find premium prices for their logs. Market opportunities exist for furniture, cross-ties for utility poles or beams for interior home design. Portable mills or existing large-log, low-volume mills can be used to “break down” large logs to meet product specifications for these markets.

Similar opportunities exist for small wood, particularly the small-diameter poles from thinning operations. Poles, posts and other supports used in agricultural and nursery operations can be a market for thinnings.

The *competitive advantage for FFLOs* is that they have the flexibility of production to meet the needs of secondary markets. By creating linkages to these markets and meeting their particular needs reliably, FFLOs can create market relationships well into the future.

Can I get rewarded for good man-

agement through higher prices and/or better access to markets? One way of getting market recognition for good management is by getting your management certified as sustainable by a certifying organization, such as the American Tree Farm System or Forest Stewardship Council. While a price premium has only been given commod-

ity markets in isolated cases, smaller markets that serve “green” manufacturers (furniture makers and custom builders) more often do provide a premium price. The more realistic reward at present is an increasing acceptance of certified wood (or not accepting uncer-

—Continued on page 28—

Landowner Success Stories

Pre-Harvest of Cedar Boughs

An example of integrating your forest product opportunities is the pre-harvest of bough material from a timber sale. A family forestland owner in Washington County recently used this strategy successfully on a harvest he and his family conducted on 50 acres of Douglas-fir.

Western redcedar was intermingled with the fir in some parts of the stand. The owner arranged with his logger to fall these cedars prior to the major operation in the stand, a clearcut. He timed the falling so that the cedar would be available for bough collecting while they were fresh. After the cedar trees were felled, the owner and his crew collected the cedar boughs for sale to local bough markets. Once the boughs were removed, the logger returned and completed the harvest operation.

The net benefit to the family was an “added value” of over \$5,000, in addition to the timber volume.

Shade Culture—Value Underneath the Canopy

The dominant tree canopy is evidence of the timber value in a forest. However, underneath the canopy is an opportunity for values of a different sort: mushrooms, floral greenery, fruits and berries—and ferns.

One family forest owner in Washington County has taken advantage of the growing space and the shaded conditions found underneath the dominant canopy by growing ferns for market. The ferns are collected as small plants from roadsides, harvest areas or other sources, and placed in pots. The pots are then placed underneath the canopy to grow under ideal light conditions, and with human care and culture, to the stage where they command a premium market price. Meanwhile, the overstory grows toward whatever timber product is specified in the owner’s management plan.

By rotating the fern-canopy combinations over time, ferns can provide an annual income while waiting for periodic timber harvests to provide the investment income.

Looking for the Value-Added Product

Certain Douglas-fir trees, primarily older trees with tight, straight grain, can be worth significantly more to the right market. One of those markets is for electrical transmission pole “cross-arms.” Cross-arms require exacting wood specifications, but command a premium price. Knowing what those specifications are, and working with a competent portable mill operator to produce them, can pay value-added dividends for landowners. Sorting these quality logs in the woods will take some time, but the added value may well be worth it.

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New Century Forest Products

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tified wood) and therefore better access to a variety of markets.

The *competitive advantages* for FFLOs who practice good management are: 1) creating quality products that fit niches not filled by commodity wood producers; and 2) access to new mar-

kets that seek sustainable certification.

My timber won't be ready to harvest for a long time. What can I market to pay my expenses in the meantime?

While large forestland owners are able to produce regular income through their scheduled harvests, FFLOs usually must wait a long time between their timber harvests. During the intervening years,

non-timber forest products can be a significant source of income for family forest owners. These products include *non-woody species*, such as mushrooms, ferns and other understory plants; *non-woody parts* of trees such as cones, fruits, bark, foliage and sap; and *woody material* such as firewood, small posts and poles, and boughs. Often, the more diverse the forest, the more types and amounts of products that can be recovered. While investment costs for harvesting are low, labor costs may be high.

The four largest segments of the non-timber forest products industry in the Pacific Northwest are holiday greens, floral decorations and greens, wild edible mushrooms and medicinal plants. The keys to success are knowing what potential products you have on your woodland, learning how to harvest them and finding markets in your area. Portions of your woodland not intensively managed for timber, such as riparian areas, meadows and low-productivity areas are good areas to explore. Jim Freed, Washington State Extension forester, knows one owner that harvests \$15,000 of bough material a year from five acres of riparian area (*Capital Press*, Dec. 13, 2002).

The *competitive advantage* for FFLOs is in-depth knowledge of their woodland with the opportunity to use the incidental growing capacity of their woodland to get a supplemental crop (or to market desirable forest experiences), and the ability to offer quality and freshness.

Next steps

What can FFLOs do to improve

CALENDAR

Private Applicator's License Training, March 11, Chemeketa Community College, Salem, OR. Contact: Agriculture Program office at 503-399-5139, 503-589-7946, or register online at <http://pipeline.chemeketa.edu>.

Family Forest Landowners Workshop, March 20-21, Moscow, ID. Contact: Chris Schnepf at 208-446-1680 or www.cnr.uidaho.edu/extforest.

Regeneration of Interior Forests, March 21-23, the Riverhouse, Bend, OR. Contact OSU Outreach Office at 541-737-2329 or <http://outreach.cof.orst.edu/>.

Tree School, March 25, Clackamas Community College, Oregon City, OR. Register by February 28. Contact: OSU Extension Service at 503-655-8631 or <http://extension.oregon-state.edu/clackamas>

Weathering the Changes on the Family Forest, March 27-28, Best Western University Inn, Moscow, ID. Contact: Clearwater RC&D Office at 208-882-4960 x4 or clwtr@moscow.com.

WSSAF Annual Meeting: Living with Wildfire—Lessons Learned, April 6-8, Campbell's Resort, Chelan, WA. Contact: Jerry Gutziler at jrgutzwiler@genext.net.

OSWA Annual Meeting: Sustaining our Woodland Neighborhoods, April 20-22, World Forestry Center, Portland, OR. Contact: OSWA at 503-588-1813 or oswa@oswa.org.

Tree School East, April 22, La Grande, OR. Contact: OSU Extension Service at 541-963-1010.

Oregon SAF Annual Meeting: What's Driving Oregon's Forest Economy: Market forces, Silviculture Practices and Land Management Decisions, April 26-28, Southwestern Oregon Community College, Coos Bay, OR. Contact: Shaun Harkins at 541-269-5540 or shaun.harkins@plumcreek.com.

Using GPS, June 2, Moscow, ID; June 10, Coeur d'Alene, ID. Contact: Randy Brooks at 208-476-4424 or www.cnr.uidaho.edu/extforest.

Managing for Biological Diversity in NW Forests, June 6-8, Red Lion on the River, Portland, OR. Contact: OSU Outreach Office at 541-737-2329 or <http://outreach.cof.orst.edu/>.

Habitat Field Day, June 16, Coeur d'Alene, ID. Contact: Chris Schnepf at 208-446-1680 or www.cnr.uidaho.edu/extforest.

Thinning & Pruning Field Day, June 9, Orofino, ID; June 17, Sandpoint, ID. Contact: Chris Schnepf at 208-446-1680 or www.cnr.uidaho.edu/extforest.

WFFA 2006 Annual Meeting—Forests and Fire, June 8-10, Stevens County Ag Trade Center & Fairgrounds, Colville, WA. Contact: Ralph Ligouri at 509-276-6079 or ligouri.lazyl@att.net.

Pruning White Pine Blister Rust, June 16, Coeur d'Alene, ID. Contact: Chris Schnepf at 208-446-1680 or www.cnr.uidaho.edu/extforest.

Space to publicize events of interest to family forest owners is available **FREE OF CHARGE** through this calendar column. Take advantage of this service by sending calendar items for the spring 2006 issue to the editor at rasor@safnwo.org by February 13. The issue will reach our readers by April 25, 2006.



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their marketing opportunities and create income sources? The following are some “do-it-yourself” ideas to improve marketing opportunities for small woodland owners.

- Search out information about a wide range of market products. Other FFLOs can be a valuable source.
- Find out what “product specifications for inventory” and inventory techniques are needed to determine how much potential you have for the products. For some products, you may have to use your judgment to extrapolate specifications from what you see on the market and what you see in your forest.
- Inventory your forestland for the products, using the specifications you have learned or developed.
- Determine how available technology can help you create saleable products: cutting guides, portable mills, drying regimes (and kilns), and other pieces of “know-how” and equipment are examples.
- Work with other FFLOs to develop cooperative ventures and relationships for multiple owners, such as marketing agents, collection and sorting facilities, primary processing (break-down) facilities, grading services, equipment sharing and financial resources for short-term loans.

The bottom line

Full utilization of your timber product is important in capturing the potential of your woodland. Markets must be found or created for the low-end material (lower quality and residual) as well as the higher quality products.

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with buyers in the marketplace. Buyers may be willing to try out a new species and “buy local,” but will demand consistency, reliability, on-time deliveries and quality that matches expectations.

Every FFLO should also have a business plan component in their management strategy. The business plan should be based on the forest-related products and services the owner expects to produce while achieving management plan goals and objectives.

The business plan will be the basis for your marketing strategy and will

serve to distinguish a pipe dream from reality. ■

TOM NYGREN is a forester and Washington County Small Woodlands Association member who owns and manages 165 acres of forestland in Washington and Douglas counties, Ore. He is also author of a report entitled, Market Opportunities for Small Owners, a project that was funded in part with a grant from the USDA Forest Service. For a copy of the report, contact Tom at 503-628-5472 or tnygren@juno.com.

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