



Washington State Westside Timber Supply

Timber is one of Washington State's chief commodities and a subject of constant debate, with forest policy decisions often based on outdated measures of inventory and management assumptions. An enhanced inventory and timber supply study was commissioned by the state legislature, resulting in a more comprehensive timber database and a more thorough analysis of many issues and assumptions.

Inventory Assessment

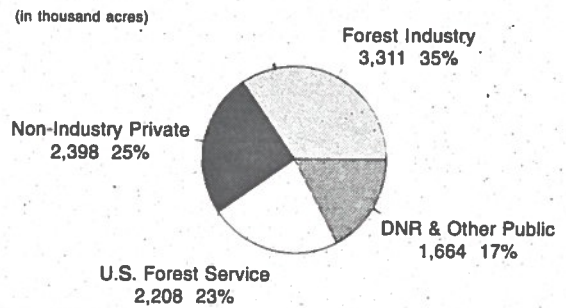
- ▲ The 9.6 million acres of western Washington State's commercial forest land contains 75% of the state's timber volume and supports 80% of the state's annual forest growth.
- ▲ Another 2.3 million acres of reserved forest land are set aside for non-timber uses; these reserves could become much larger after final rulings on spotted owl habitat.
- ▲ Forest acreage has declined 8% on private land and 11% on public land since 1952, a one million acre loss to other uses. A 950,000 acre decline is projected over the next 100 years; 60,000 acres per decade are expected to be converted from forests to other uses on non-industrial private land.
- ▲ The new inventory shows substantially higher values for Department of Natural Resources (DNR) and private owners: 30-40% higher than current DNR and 15-20% higher than current Washington Forest Protection Association (WFPA) inventory measures. Most of the higher inventory is in stands approaching harvestable age.

The new enhanced survey of inventory shows substantial differences compared to data now being used by state and private planners and analysts. Technical and procedural measurement differences may eventually explain these differences. But until then, policy conclusions will be very dependent upon the source of inventory and the assumptions that the inventory is built upon.

Harvest Potential: the Next 100 Years

- ▲ Continued intensive management is assumed for industry and moderately intensive management for state timberland. Low management levels are assumed for non-industrial private owners.
- ▲ A total harvest of at least one billion cubic feet per year can be sustained, according to timber supply projections. This level is nearly stable, despite federal harvest declines of 120 million cubic feet per year.
- ▲ Pre-survey inventory assumptions—those still in use—suggest harvest declines of 10% or more in the near term, with the differences decreasing over time to just a few percent by 2050.
- ▲ Land withdrawal and conversion trends are causing a slow decline in potential harvest.
- ▲ Delaying harvest by 10 years to create older age classes decreases harvest 15% in the near term.
- ▲ Increasing management intensity on non-industrial private land, or decreasing management on industry lands, will have significant impacts. Future harvest levels are therefore sensitive to forest practice regulations and tax policy.

Western Washington Commercial Timberlands (non-reserved lands)



total: 9,581,000 acres



Regional Differences

Historical harvest patterns and land uses impact regional harvest levels. On non-federal lands,

- ▲ the North Coast harvest increases 15% by 2040.
- ▲ the South Coast harvest decreases 12% by 2025.
- ▲ the North and South Puget Sound harvests decrease 20% by 2040 due to large land withdrawals.
- ▲ the Southwest Washington harvest remains reasonably stable throughout the projection period, although 15% below 1980's harvest levels.

U.S. Forest Service (USFS) harvest declines are largest in the North Coast region. Removing even flow restrictions by timbershed region or by owner group helps to ease the problem of age class imbalance within this area. The total sustainable harvest can increase by 6% prior to 2005 relative to initial levels if even flow restrictions are maintained only for the timbershed and not for each ownership class.

Economics/Jobs

- ▲ Productivity trends and labor intensification result in 0.8% job losses per year for the Westside Washington region, or roughly 460 jobs per year. This trend results in 6650 forest sector jobs lost by the year 2005 (includes land withdrawals).
- ▲ Reduced area losses—or increased secondary manufacturing—may offset job losses.
- ▲ Assuming lower inventories, reducing forest management or delaying harvests will increase job losses.

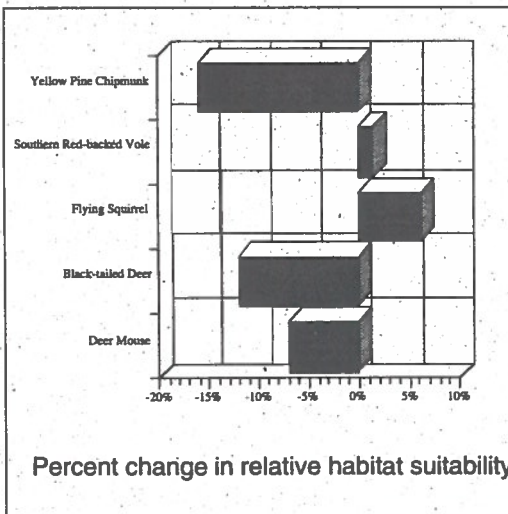
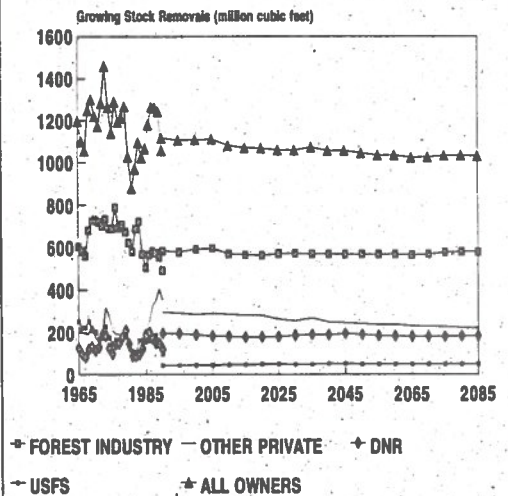
Ecosystem Attributes/Wildlife

- ▲ Stands in grass-forb, open sapling-pole, and closed sapling-pole-sawtimber classes decline.
- ▲ Stands in large sawtimber and old-growth rise modestly.
- ▲ Stands on private lands become younger; those on public lands older.
- ▲ Habitat suitability declines for species favoring earlier seral stages; habitat suitability increases for those species favoring old-growth.
- ▲ Management alternatives and land withdrawal changes will alter the amount and mix of habitat.

Future Issues

- ▲ Understanding timber inventory measurement issues is key to the forest sector outlook.
- ▲ Planning from incorrect growth assumptions or from incorrect inventory measures can substantially alter harvests.
- ▲ While the new inventory assessment would seem to support nearly stable outlook conditions, many assumptions and policy alternatives can substantially alter the outcome.
- ▲ Preservation or wildlife regulations may reduce the harvest either directly or indirectly through reduced investment in forest management.
- ▲ Both jobs and wildlife habitat are impacted by management alternatives.
- ▲ Incentives for biodiversity objectives or non-industrial timber investments may produce desirable results with lower overall costs.

Projected Western Washington Timber Harvest



CINTRA FOR cooperated with the Society of American Foresters in sponsoring a conference on the inventory and timber supply results, addressing issues raised by policy makers, land managers, and technical reviewers. The timber supply study, titled "Future Prospects for Western Washington's Timber Supply," is available from CINTRA FOR as Special Paper #12.