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The Future of the Douglas-fir Region Forest Economy: Potential Development Under Changing Public Policies and Private Resources

Darius M. Adams and Richard W. Haynes. 1989

Over the next two decades, the Douglas-fir region faces an array of changes in timber supply structure that will markedly effect the future development potential of its forest products economy. In the private sector, supplies from industrial and non-industrial lands will follow divergent paths. Industrial timber inventory, which has declined steadily since the inception of harvesting, will reach its nadir, and the concentration of both inventory and cut will shift from older stands of natural origin to younger, smaller, managed stands. This transition will likely entail a reduction in harvest. In contrast, non-industrial inventories have been stable to rising over the past four decades and harvest is nearing peak post-WWII levels. The key concerns for this owner group are its willingness and, to a lesser extent, its ability to sustain these higher harvest levels. On public lands, the growing significance of non-commodity values and preservation of biological diversity in management objectives will almost certainly lead to some harvest reduction. The ultimate extent and exact timing are not at all clear, but the effect will be to amplify the impacts of reductions in industrial cut. In the longer term, public harvest policies remain a critical factor but the industrial outlook is essentially reversed. With the maturation of large areas of managed timber, growth and merchantable inventory on industrial lands will expand, setting the stage for a resurgence in harvest.

This paper examines the development prospects of the Douglas-fir region forest sector over the next fifty years. The analysis highlights the age class and management transition on industrial timberlands, harvest potentials on non-industrial ownerships, and levels of public harvest as prime sources of uncertainty in both the near and longer term outlook for the region. The next sections give an overview of the regional forest industry, current resource conditions, and potential sources of variation in future public harvest levels. Subsequent sections present specific projections of the region's future and a discussion of the results.

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