



Oregon Forest Sector Analysis

OFRI Board of Directors Meeting
Gail Krumenauer & Anna Johnson
January 21, 2021



Partnership and collaboration define Oregon's forest sector analysis.

Oregon Employment Department, Oregon Department of Forestry, and Oregon Forest Resources Institute collaborate to define sector

Employment Department and OFRI gather and summarize jobs data



Defining Oregon's Forest Sector

1. Covered employment in a set of “standard” industry codes
2. Certified private foresters (cross-checked by firm) and county government foresters
3. Oregon State University School of Forestry staff
4. Jobs at forest-related establishments in other industry codes (e.g., 55111 management of companies)
5. Employment at establishments with active log and chip truck registrations
6. Nonemployers in standard forest industries

Primary Forest Products	
321211	Hardwood veneer and plywood
3211	Sawmills and wood preservation
322	Paper manufacturing
321212	Softwood veneer and plywood
321219	Reconstituted wood products
321213	Engineered wood member (except truss)
321214	Truss manufacturing
Forestry Support	
1133	Logging
11531	Support activities for forestry
333243	Sawmill, woodworking, and paper machinery
1132	Forest nurseries and gathering forest products
62431	Vocational rehabilitation services
Secondary Forest Products	
32191	Millwork
33711	Wood kitchen cabinets and countertops
321991	Manufactured and mobile homes
32192	Wood containers and pallets
321999	All other miscellaneous wood products
337212	Custom architectural woodwork and millwork
337122	Nonupholstered wood household furniture
321992	Prefabricated wood buildings
337211	Wood office furniture
Forestry Management	
1131	Timber tract operations
924120	Administration of conservation programs
551114	Corporate, subsidiary, and regional managing offices
6113	Colleges, universities, and professional schools
813910	Business associations
9211	County government foresters and support staff
-	Additional private certified foresters/consultants
Forestry-Dependent Industries	
42331	Lumber, plywood, millwork, and wood panel merchant wholesalers
42411	Printing and writing paper merchant wholesalers
42413	Industrial and personal service paper merchant wholesalers
-	All other identified forestry sector firms
Multiple	Transportation



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Oregon had 61,600 forest sector jobs in 2019.

Oregon's Forest Sector Jobs By Ownership, 2019

Ownership	Jobs
Private	52,450
Federal	4,642
Nonemployers	3,302
State	838
Local	324
Total	61,556

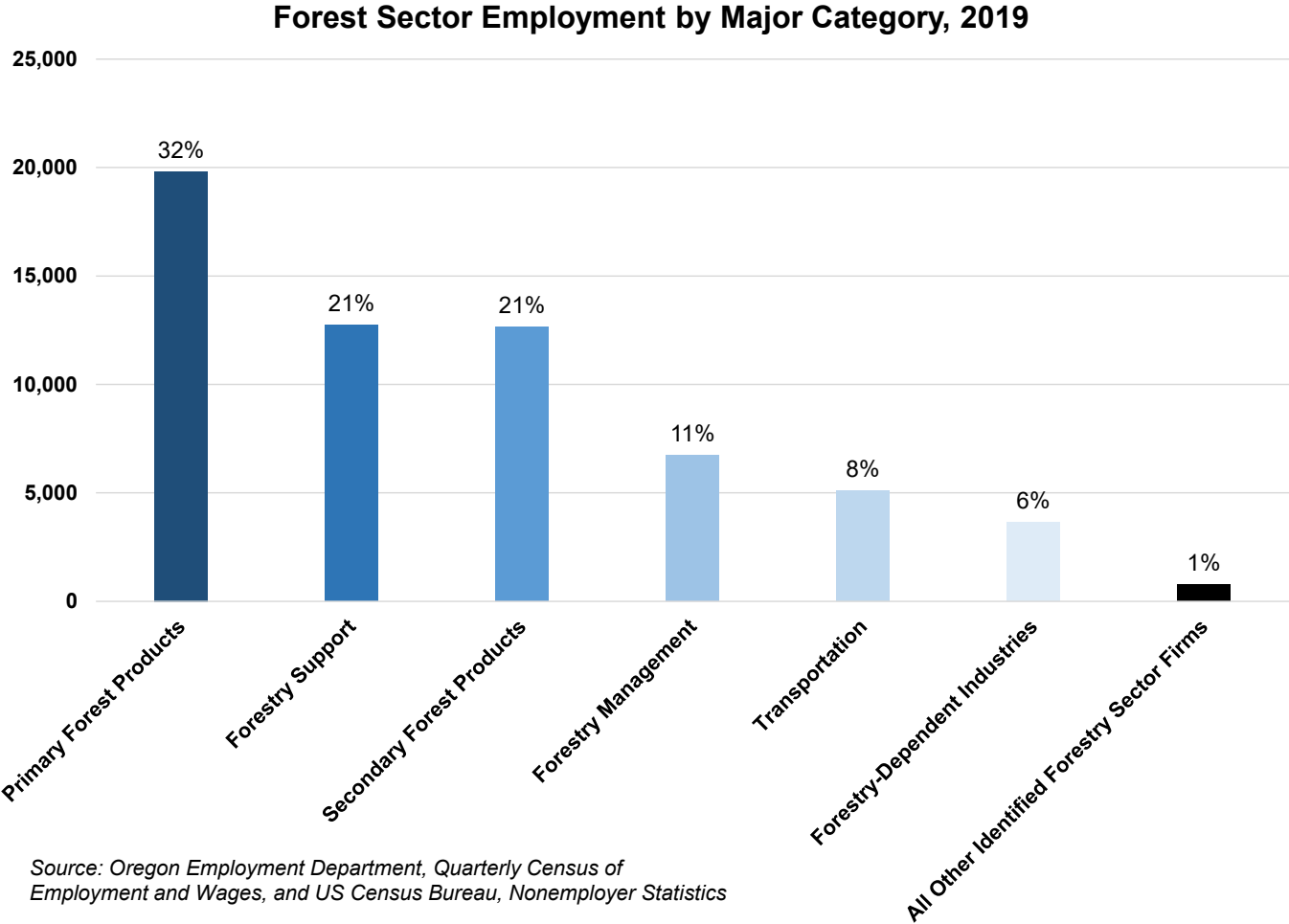
*Source: Oregon Employment Department,
Quarterly Census of Employment and
Wages, and US Census Bureau,
Nonemployer Statistics*

Forest-Related Industries with Nonemployers

Logging	1,543
Support activities for forestry	559
Hardwood veneer and plywood	556
Wood kitchen cabinets and countertops	444
Lumber, plywood, millwork, and wood panel merchant wholesalers	127
Printing and writing paper merchant wholesalers	59
Paper manufacturing	14

Private sector employment accounted for 85% of all forest sector jobs in the state.

Oregon's forest sector falls into five major categories: primary forest products; secondary forest products; forest management; forestry support; and forestry-dependent industries.

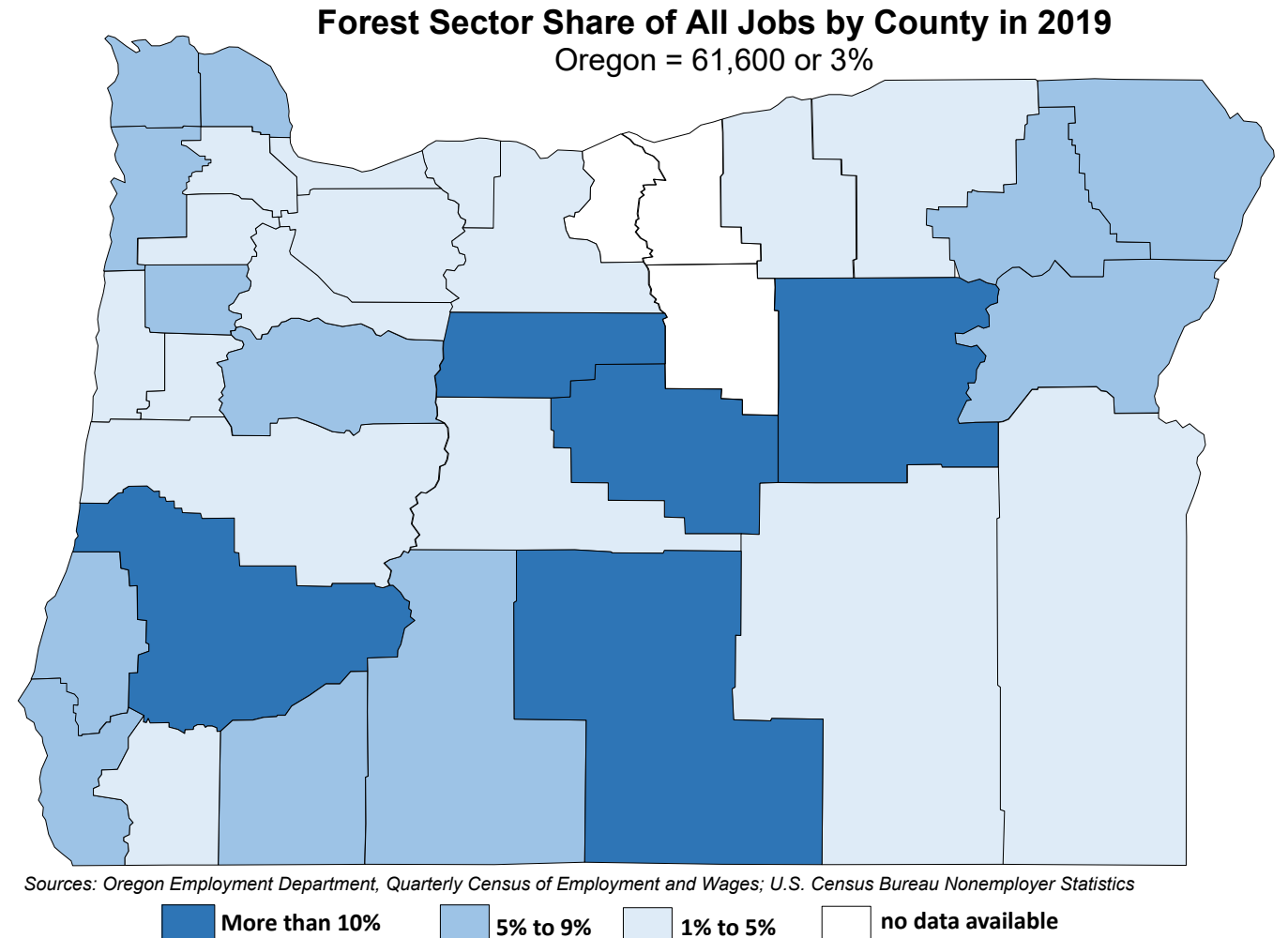


Unlike the overall forest sector, most forestry management jobs were found in government.

NAICS	Industry Name	All	Federal	State	Local ¹	Private
	Forestry Management	6,746	4,602	828	272	1,044
1131	Timber tract operations	4,168	3,661	174		333
924120	Administration of conservation programs	1,595	941	654		-
551114	Corporate, subsidiary, and regional managing offices	641				641
6113	Colleges, universities, community colleges, and professional schools	248			248	
813910	Business associations	26				26
9211	County government foresters and support staff	24			24	-
-	Additional private certified foresters/consultants	44				44

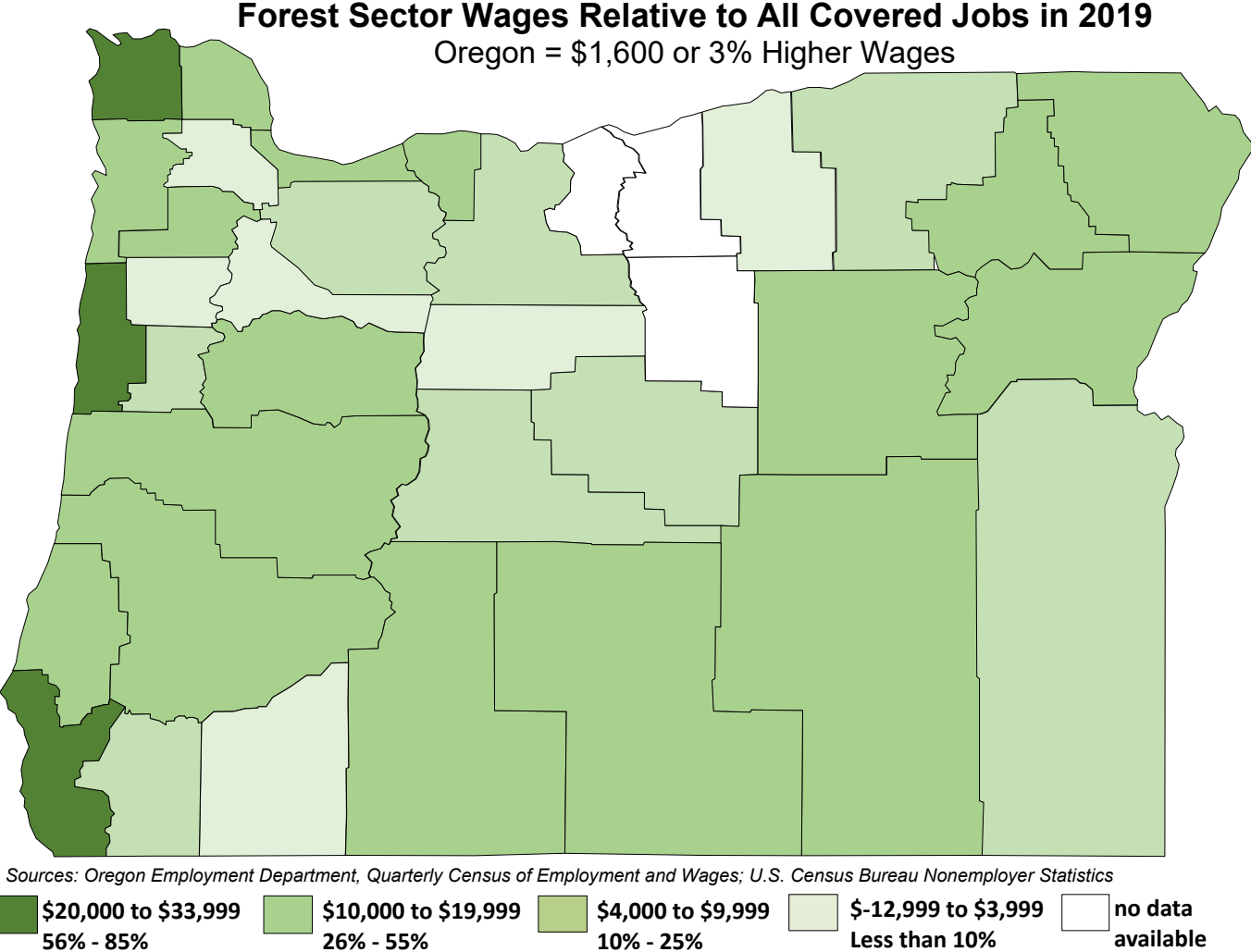
Forest sector jobs make up higher shares of employment and pay above-average wages in rural areas.

Forest sector jobs accounted for 2% of employment in metropolitan areas, and 7% of employment in rural counties.



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Forest-related jobs paid relatively well, with an annual average wage of \$56,600, roughly 3% more than the average of \$55,000 for all jobs covered by unemployment insurance in 2019.



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