FOREST INDUSTRY RESEARCH PROGRAM
UNIVERSITY OF MONTANA

Forest Industry Research Program
Bureau of Business and Economic Research
University of Montana – Missoula
www.business.umt.edu/FIR/

SOUTHWEST IDAHO ACTIVE FOREST MANAGEMENT STRATEGY AREA

Introduction:

This document provides information about the Southwest Idaho Active Forest Management Strategy Area (AFMSA). It was generated by the Forest Industry Research Program of the Bureau of Business and Economic Research (BBER) at the University of Montana - Missoula. The mill survey data underlying these analyses were collected under joint venture agreements with the USDA Forest Service's Forest Inventory and Analysis program at the Pacific Northwest Research Station (#21-JV-11261979-053) and Rocky Mountain Research Station (#20-JV-11221638-171). The landscape analyses and summary tables were developed under agreement #23-PA-11132400-368, and the residuals tables were developed under agreement #25-JV-11261936-106.

The data used in these analyses are the results of periodic censuses of each of the western states, as well as annual sample surveys of the same. Using data from both types of surveys allows us to provide time-series data, though it necessitates providing estimates as percentages rather than actual volume.

While BBER collects data at the mill level, mill-level data are confidential and will not be released.

Methods and Definitions:

The Southwest Idaho AFMSA covers a defined area that includes pieces of several counties. The combined area of the counties "touched" by this area constitutes its "Study Area" (for details, see fig. 1 and table 1). Defining a Study Area that covers entire counties is necessary to enable analysis, as the county is the smallest geographic area of mill survey data by BBER and FIA-TPO.

Further, BBER analysis of timber flow indicates that timber harvested within the Study Area is processed by facilities located both inside and outside this specific area. All counties that contain one or more facilities that process timber harvested within the Study Area constitute the "Timber Processing Area" (TPA) (for details, see fig. 1 and table 4).

In these tables, “capacity” refers to the maximum total volume of timber (excluding pulpwood and fuelwood) that existing timber processors could utilize annually, given firm market demand for products, sufficient raw material, and ordinary downtime for maintenance. Also known as “timber-processing capacity”, it is a measure of mills’ timber input capacity and is expressed in thousand board feet (MBF) Scribner and hundred cubic feet (CCF) per year. Input capacity is a useful measure when attempting to express the capacity of multiple types of mills in a common unit of measure. It is estimated from production (output) capacity information provided by facilities.

Estimates in these tables include the capacity of active facilities as well as idle (inactive) facilities with equipment still in place. Facilities that are permanently closed are not included. This analysis focuses on facilities that exclusively use timber in round form; this includes sawmills, veneer mills, and facilities processing timber into house logs/log homes, posts, small poles, utility poles, cedar products (e.g., shakes and shingles), and log furniture. Facilities (e.g., pulp mills, wood pellet manufacturers, and biomass energy facilities) that use a mix of roundwood and non-roundwood inputs (i.e., mill residuals such as chips, sawdust, shavings, and bark) are not included in the capacity analysis because the combination of roundwood and non-roundwood inputs can vary widely from year to year, potentially over- or under-estimating capacity and use of roundwood by substantial margins.

“Capability” refers to the volume of trees of a certain size class (measured as diameter at breast height, or dbh) that existing timber processors can economically process annually. The three dbh classes are <7”, 7" to 9.9”, and ≥10”. Some facilities are designed to operate using only trees of a given size class (e.g., veneer/ plywood plants typically only use trees ≥10” dbh, and post manufacturers primarily use trees <10” dbh). The capability of these facilities is readily classified into just one size class. Many facilities can use timber from more than one size class.

“Use” refers to the volume of timber, both in total and by tree dbh class, that facilities are currently using.

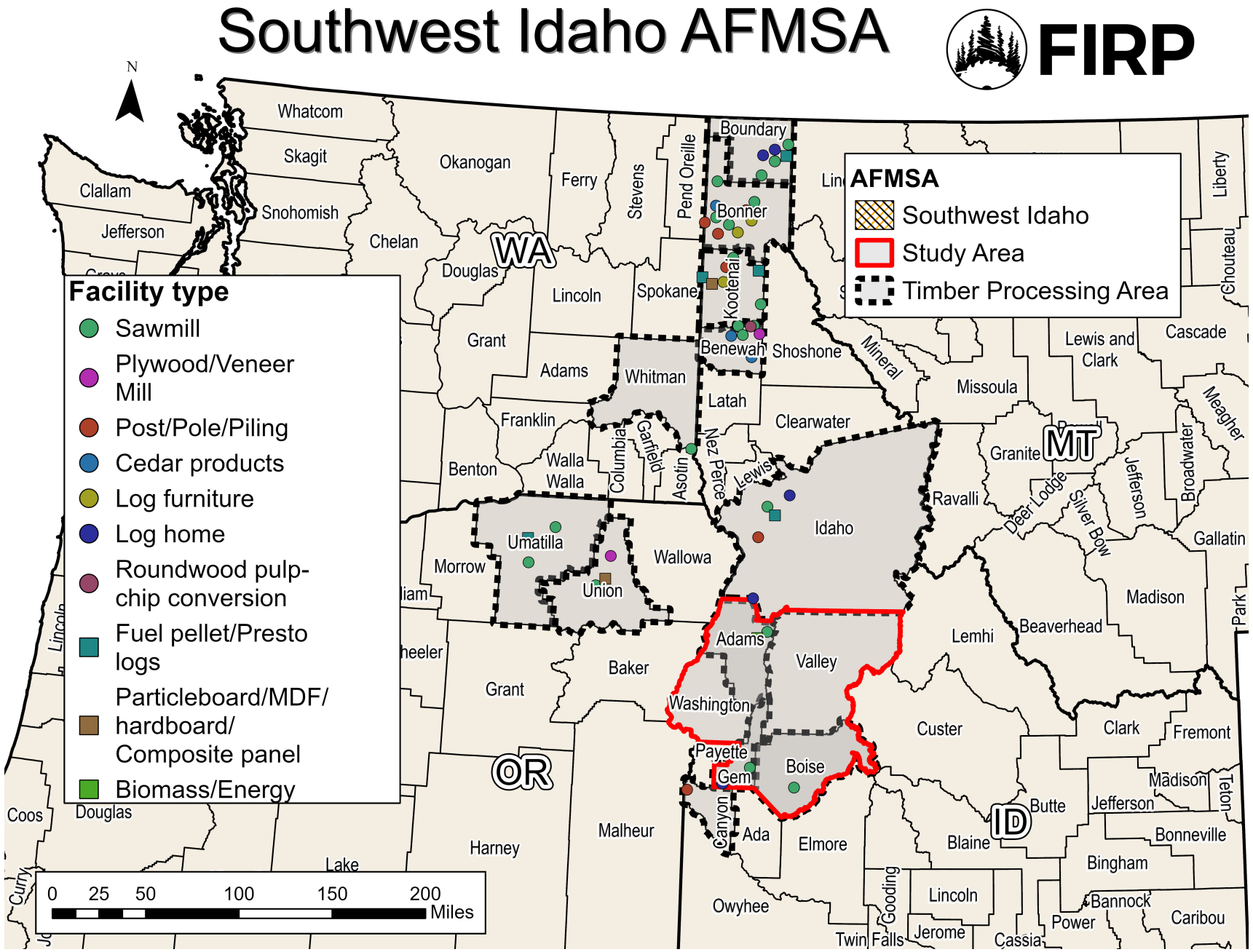

Figure 1. Southwest Idaho landscape, Study Area, Timber Processing Area, and facility locations

SOUTHWEST IDAHO STUDY AREA COUNTIES

Table 1. Southwest Idaho Study Area counties

County	State
Adams	ID
Boise	ID
Gem	ID
Valley	ID
Washington	ID

SOUTHWEST IDAHO STUDY AREA HARVEST

Table 2. Timber harvest from Southwest Idaho Study Area counties (all ownerships), by percentage distribution by species (2020-2023)

Species group	2020	2021	2022	2023
True firs	42%	44%	16%	19%
Douglas-fir	32%	41%	15%	24%
Ponderosa pine	16%	1%	64%	49%
Larch	3%	5%	1%	2%
Cedar	3%	7%	3%	3%
Lodgepole pine	2%	0%	0%	0%
Engelmann spruce	2%	0%	1%	2%
Other pines	0%	2%	0%	0%
Hemlock	0%	0%	0%	1%
All species	**100%**	**100%**	**100%**	**100%**

Table 3. Percentage of timber harvest from national forest lands within the Southwest Idaho Study Area, by timber product type (2020-2023)

	----------Percentage from national forests----------			
Timber product type	**2020**	**2021**	**2022**	**2023**
Sawlogs/Veneer logs	38%	6%	16%	38%
Posts/Poles/House logs	92%	0%	0%	50%
Study area total	**39%**	**6%**	**16%**	**38%**

SOUTHWEST IDAHO TIMBER-PROCESSING AREA COUNTIES

Table 4. Southwest Idaho Timber-processing Area (TPA) counties

County	State
Adams	ID
Benewah	ID
Boise	ID
Bonner	ID
Boundary	ID
Canyon	ID
Gem	ID
Idaho	ID
Kootenai	ID
Umatilla	OR
Union	OR
Whitman	WA

SOUTHWEST IDAHO TIMBER-PROCESSING AREA FACILITIES LIST

Table 5. Timber-processing facilities within the Southwest Idaho TPA (2025)

Facility name	Status	Facility type	State	County	Input size class	Included in capacity analysis
Evergreen Forest Products - Tamarack Mill	Active	sawmill	ID	Adams	5000 MCF or more	Yes
Evergreen Forests - Cogen	Active	biomass/energy	ID	Adams	n/a	No
American Cedar	Active	cedar products	ID	Benewah	500 to 999 MCF	Yes
DLM Shake	Active	cedar products	ID	Benewah	<250 MCF	Yes
PotlatchDeltic--St Maries (lumber)	Active	sawmill	ID	Benewah	5000 MCF or more	Yes
PotlatchDeltic--St. Maries (plywood)	Active	plywood/Veneer Mill	ID	Benewah	5000 MCF or more	Yes
Roland Timber Company	Inactive	sawmill	ID	Benewah	<250 MCF	Yes
Stimson Lumber Company (St. Maries)	Active	sawmill	ID	Benewah	5000 MCF or more	Yes
Swan Lake Fiber	Active	roundwood pulp-chip conversion	ID	Benewah	1000 to 4999 MCF	Yes
Nelson Custom Milling	Active	sawmill	ID	Boise	<250 MCF	Yes
Barretts Busy B	Active	cedar products	ID	Bonner	<250 MCF	Yes
Bell Lumber & Pole - Oldtown	Active	post/pole/piling	ID	Bonner	250 to 499 MCF	Yes
Idaho Forest Group - Laclede	Active	sawmill	ID	Bonner	5000 MCF or more	Yes
Johns Rough Cut	Active	log furniture	ID	Bonner	<250 MCF	Yes
Misty Mountain Furniture	Active	log furniture	ID	Bonner	<250 MCF	Yes
Panhandle Forest Products	Active	post/pole/piling	ID	Bonner	250 to 499 MCF	Yes
Priest Lake Lumber Company, Inc.	Inactive	sawmill	ID	Bonner	<250 MCF	Yes
Specialty Beams	Active	sawmill	ID	Bonner	<250 MCF	Yes
Stella Jones - McFarland Cascade Sandpoint	Active	post/pole/piling	ID	Bonner	1000 to 4999 MCF	Yes
Stimson Lumber Company (Priest River)	Active	sawmill	ID	Bonner	5000 MCF or more	Yes
Parma Post & Pole, Inc.	Active	post/pole/piling	ID	Canyon	1000 to 4999 MCF	Yes
Gem House Logs Manufacturer	Active	log home	ID	Gem	<250 MCF	Yes
Sweet Lumber Company	Active	sawmill	ID	Gem	<250 MCF	Yes
Woodgrain Millworks - Emmett	Active	sawmill	ID	Gem	5000 MCF or more	Yes
Frye Custom Log Homes	Active	log home	ID	Idaho	<250 MCF	Yes
Idaho Forest Group - Grangeville	Active	sawmill	ID	Idaho	5000 MCF or more	Yes
Pineda Post and Poles	Active	post/pole/piling	ID	Idaho	250 to 499 MCF	Yes
Pleasant Valley Log Homes	Active	log home	ID	Idaho	250 to 499 MCF	Yes
Camas Post Yard	Active	post/pole/piling	ID	Lewis	<250 MCF	Yes
Empire Lumber Company - Weippe (sawmill)	Active	sawmill	ID	Lewis	5000 MCF or more	Yes
Star Cedar Sales, Inc.	Active	cedar products	ID	Lewis	250 to 499 MCF	Yes

Table 5. Timber-processing facilities within the Southwest Idaho TPA (2025), continued

Facility name	Status	Facility type	State	County	Input size class	Included in capacity analysis
Clearwater Paper - Co Gen	Active	biomass/energy	ID	Nez Perce	n/a	No
Clearwater Paper Corporation	Active	pulp/paper	ID	Nez Perce	No Roundwood	No
Clearwater Paper Corporation Consumer Products Div	Active	pulp/paper	ID	Nez Perce	No Roundwood	No
Ground Covers International	Active	bark, shavings, non-pulp chips	ID	Nez Perce	No Roundwood	No
Idaho Forest Group - Lewiston	Active	sawmill	ID	Nez Perce	5000 MCF or more	Yes
Blue Mountain Lumber Products LLC	Active	sawmill	OR	Umatilla	1000 to 4999 MCF	Yes
Eastern Oregon Custom Milling	Active	sawmill	OR	Umatilla	<250 MCF	Yes
Woodgrain Millwork - Pilot Rock	Active	sawmill	OR	Umatilla	1000 to 4999 MCF	Yes
Boise Cascade Elgin Plywood	Active	plywood/Veneer Mill	OR	Union	5000 MCF or more	Yes
Woodgrain - Particleboard	Active	particleboard/MDF/hardboard/composite panel	OR	Union	No Roundwood	No
Woodgrain Millwork - La Grande	Active	sawmill	OR	Union	1000 to 4999 MCF	Yes

TIMBER RECEIVED BY TIMBER-PROCESSING FACILITIES IN THE SOUTHWEST IDAHO TIMBER-PROCESSING AREA

Table 6. Timber received by facilities in the Southwest Idaho TPA, percentage distribution by species (2020-2023)

Species group	2020	2021	2022	2023
True firs	32%	28%	25%	22%
Douglas-fir	29%	34%	30%	31%
Cedars	11%	12%	10%	8%
Ponderosa pine	8%	5%	14%	16%
Larch	7%	8%	8%	7%
Hemlock	6%	5%	5%	9%
Lodgepole pine	5%	5%	5%	4%
Other pines	1%	2%	1%	1%
Engelmann spruce	1%	1%	2%	2%
All species	**100%**	**100%**	**100%**	**100%**

Table 7. Percentage of timber from national forests received by facilities in the Southwest Idaho TPA, by timber product type (2020-2023)

	----------Percentage from national forests----------			
Timber product type	**2020**	**2021**	**2022**	**2023**
Posts/Poles/Furniture logs	96%	78%	96%	83%
House logs	70%	84%	84%	80%
Veneer logs	22%	13%	14%	27%
Pulpwood/Energy logs	16%	0%	15%	0%
Sawlogs	14%	13%	13%	24%
Firewood	n/a	n/a	100%	n/a
Study area total	**15%**	**13%**	**15%**	**24%**

Note: "n/a" indicates that no timber of this product type was harvested.

TIMBER-PROCESSING CAPACITY AND CAPABILITY OF TIMBER-PROCESSING FACILITIES WITHIN THE SOUTHWEST IDAHO TIMBER-PROCESSING AREA

Table 8. Timber-processing capacity and capability by tree dbh class of facilities in the Southwest Idaho TPA, by county or county group (2020, 2022, 2023)

	---------Thousand board feet, Scribner (MBF)---------			----------Hundred cubic feet (CCF)----------		
Timber Processing Area	<7 in. dbh	7 - 9.9 in. dbh	≥10 in. dbh	<7 in. dbh	7 - 9.9 in. dbh	≥10 in. dbh
Idaho	**43,081**	**318,979**	**519,445**	**119,498**	**715,285**	**1,097,323**
Adams, Idaho	1,146	63,222	130,215	8,983	137,988	278,379
Benewah	8,350	57,291	139,993	28,797	146,576	283,533
Boise, Canyon, Gem	1,098	8,257	23,283	8,607	20,307	49,691
Bonner	5,051	67,211	98,169	12,424	147,005	212,998
Boundary	13,274	60,245	60,685	28,326	128,578	129,530
Kootenai	14,161	62,753	67,100	32,360	134,831	143,192
Oregon & Washington	**2,545**	**29,023**	**132,128**	**5,877**	**69,726**	**298,728**
Umatilla, Union, OR; Whitman, WA	2,545	29,023	132,128	5,877	69,726	298,728
Total	**45,625**	**348,002**	**651,573**	**125,375**	**785,011**	**1,396,051**

Table 9. Timber-processing capacity and capability by tree dbh class of facilities in the Southwest Idaho TPA, by timber product type (2020, 2022, 2023)

	---------Thousand board feet, Scribner (MBF)---------			----------Hundred cubic feet (CCF)----------		
Timber product type	<7 in. dbh	7 - 9.9 in. dbh	≥10 in. dbh	<7 in. dbh	7 - 9.9 in. dbh	≥10 in. dbh
Saw logs	38,679	324,791	494,824	82,988	700,941	1,073,277
Pulpwood logs	3,993	8,785	3,195	19,499	42,898	15,599
Post or poles	2,862	11,942	11,333	22,432	35,310	27,178
Furniture logs	91	30	-	456	152	-
Veneer logs	-	-	134,828	-	-	260,092
House logs	-	2,288	4,249	-	5,169	9,599
Cedar logs	-	165	3,144	-	542	10,307
Total	**45,625**	**348,002**	**651,573**	**125,375**	**785,011**	**1,396,051**

Table 10. Total timber-processing capacity, timber consumption, and capacity utilization of facilities in the Southwest Idaho TPA, by dbh class (2020, 2022, 2023)

	----Capacity to process timber-----		--------Timber consumption---------		
Tree dbh	Thousand board feet, Scribner (MBF)	Hundred cubic feet (CCF)	Thousand board feet, Scribner (MBF)	Hundred cubic feet (CCF)	**Capacity utilization**
<7 in.	45,625	125,375	1,648	11,852	9%
7 - 9.9 in.	348,002	785,011	84,707	187,667	24%
≥10 in.	651,573	1,396,051	783,666	1,682,584	121%
Total	**1,045,199**	**2,306,438**	**870,021**	**1,882,103**	**82%**

Table 11. Unused timber-processing capacity of facilities in the Southwest Idaho TPA, by county or county group (2020, 2022, 2023)

Timber Processing Area	**Thousand board feet, Scribner (MBF)**	**Hundred cubic feet (CCF)**
Idaho	**146,150**	**357,878**
Adams, Idaho	41,742	95,747
Benewah	23,575	83,815
Boise, Canyon, Gem	2,372	5,066
Bonner	20,029	46,155
Boundary	34,769	74,231
Kootenai	23,664	52,863
Oregon & Washington	**29,027**	**66,458**
Umatilla, Union, OR; Whitman, WA	29,027	66,458
Total	**175,178**	**424,336**

Table 12. Unused timber-processing capacity of facilities in the Southwest Idaho TPA, by timber product type (2020, 2022, 2023)

Timber product type	Thousand board feet, Scribner (MBF)	Hundred cubic feet (CCF)
Saw logs	131,662	285,658
Veneer logs	13,937	28,838
Pulpwood logs	12,200	59,568
Posts or poles	11,462	35,579
House logs	4,813	10,873
Cedar logs	989	3,243
Furniture logs	115	577
Total	**175,178**	**424,336**

RESIDUALS GENERATED BY TIMBER-PROCESSING FACILITIES IN THE SOUTHWEST IDAHO TIMBER-PROCESSING AREA

Table 13. Mill residuals generated by timber-processing facilities within the Southwest Idaho TPA (2020, 2022, 2023)

	BDUs[a]	Percent of total volume
Utilized residuals volume	1,242,804	99.72%
Unutilized residuals volume	3,464	0.28%
Total volume generated	**1,246,268**	**100.00%**

[a] One bone dry unit (BDU)= 2,400 pounds of oven-dry wood or bark.

Table 14. Mill residuals generated by timber-processing facilities within the Southwest Idaho TPA, by type of residual (2020, 2022, 2023)

Type of residual	BDUs[a]	Percent of total volume
Coarse[b]	626,100	50%
Fine[c]	331,684	27%
Bark	288,484	23%
Total, all residual types	**1,246,268**	**100%**

[a] One bone dry unit (BDU) = 2,400 pounds of oven-dry wood or bark.

[b] Includes slabs, edgings, and trimmings from lumber manufacturing; log ends; pieces of veneer not suitable for manufacturing plywood; and plywood peeler cores not sawn into lumber.

[c] Includes sawdust, peelings and shavings.

Idaho TPA, by type of utilization (2020, 2022, 2023)

Type of utilization	BDUs[a]	Percent of total volume
Fiber[b]	756,843	61%
Fuel[c]	368,693	30%
Sold as raw material for other products	90,903	7%
Mulch/soil addititves	22,333	2%
Animal bedding	2,858	0%
Decorative landscaping	1,175	0%
Used on-site for other products	-	0%
Unused	3,464	0%
Total, all types of utilization	**1,246,268**	**100%**

[a] One bone dry unit (BDU) = 2,400 pounds of oven-dry wood or bark.

[b] Includes pulp, composite panels, and MDF.

[c] Includes firewood, biomass, hogfuel, and pellets.