



Regional Timber and Forest Products Market

HDC & HUGs



Promotion, Workforce Development,
Market & Industry Expansion, &
Education & Outreach

PA's Forest Products Industry



\$21.8 BILLION DIRECT ECONOMIC IMPACT
\$36 BILLION TOTAL ECONOMIC IMPACT
60,000+ EMPLOYEES & OVER 2,100 COMPANIES

Markets



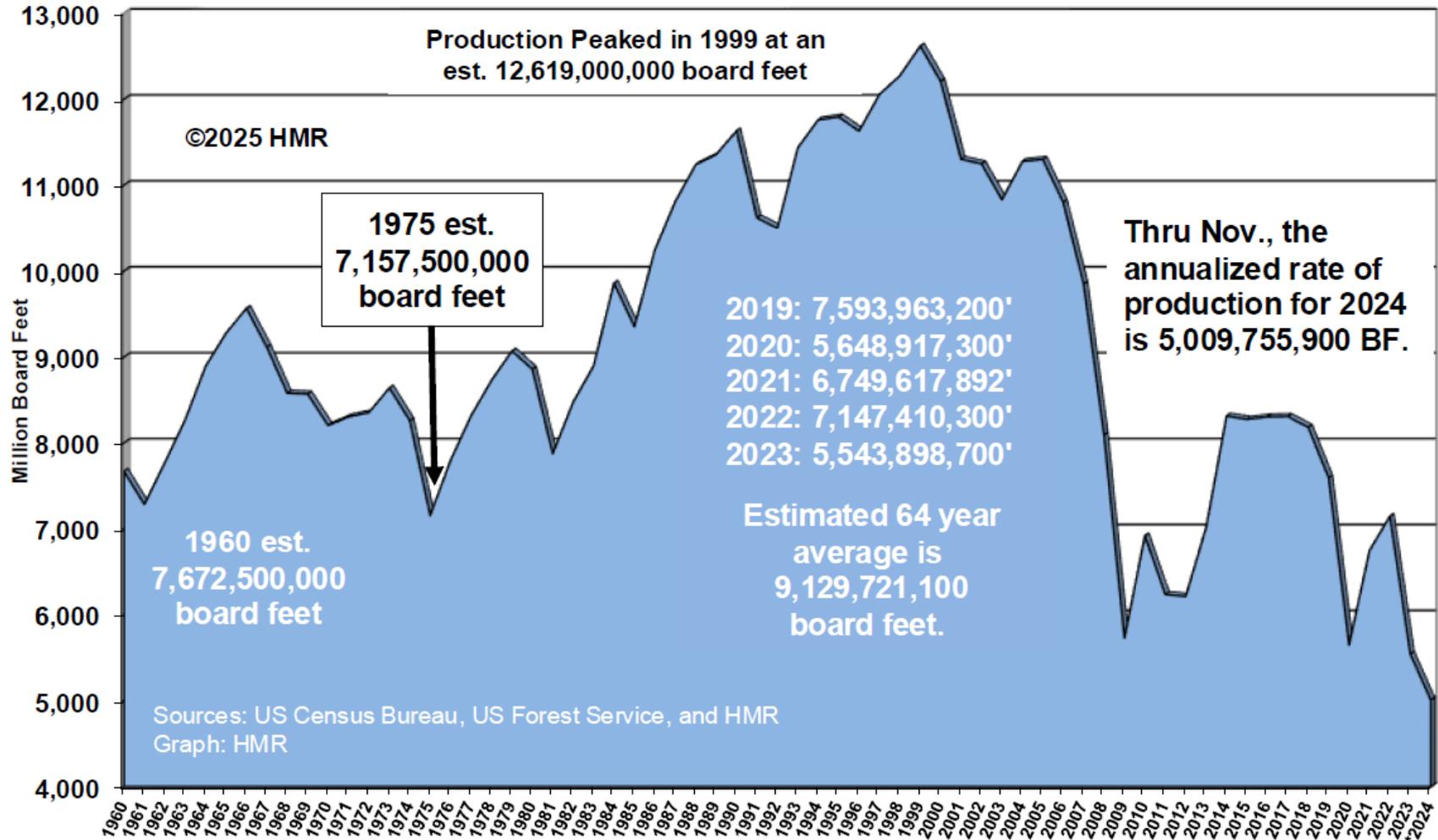
Robust large diameter/high grade markets
+
Robust small diameter/low grade markets
=
Sustainable Forest Management
&
Increased Wood Utilization

Constant: need for forest management

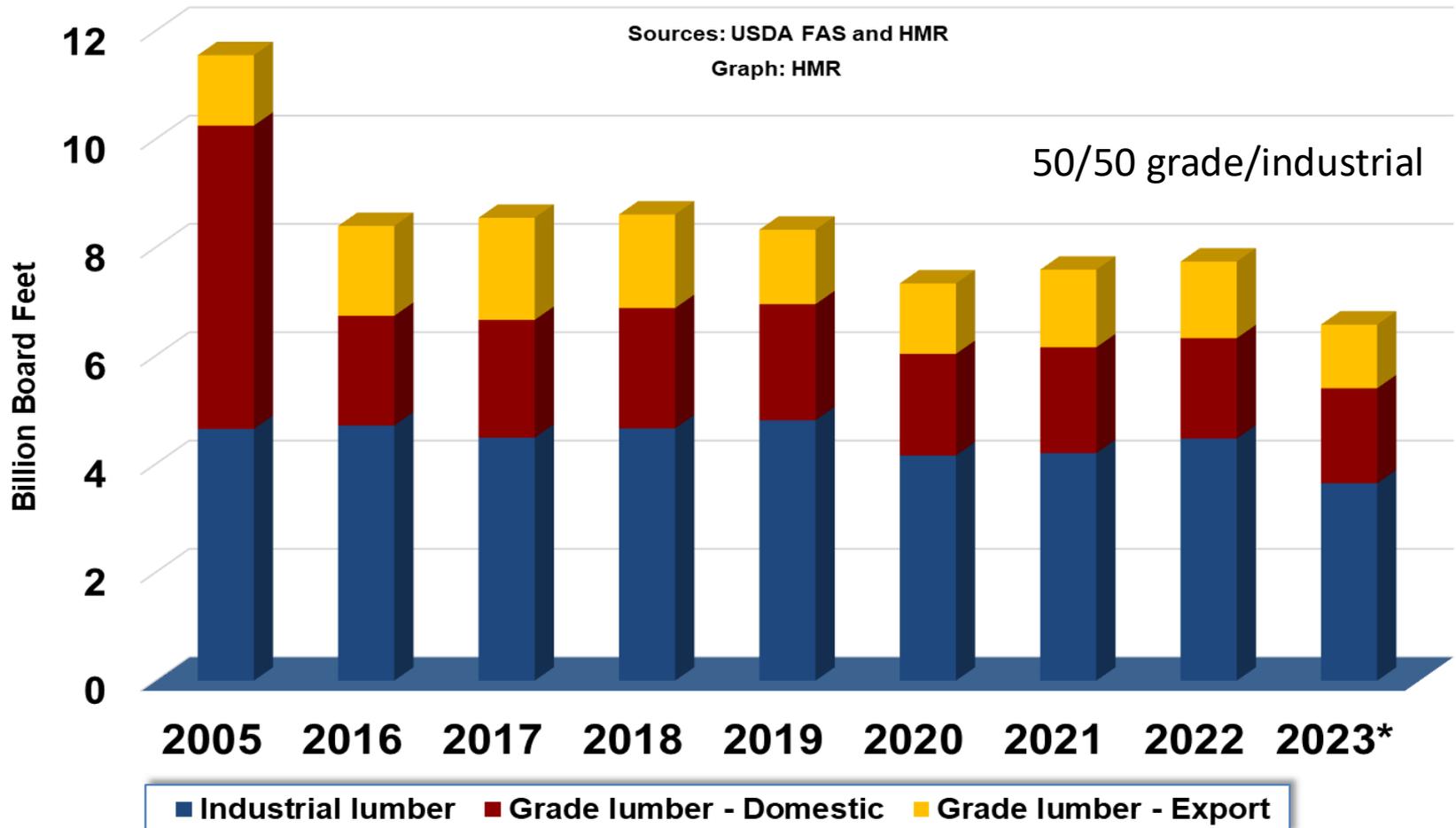
Hardwood Lumber Production



Eastern US Hardwood Production



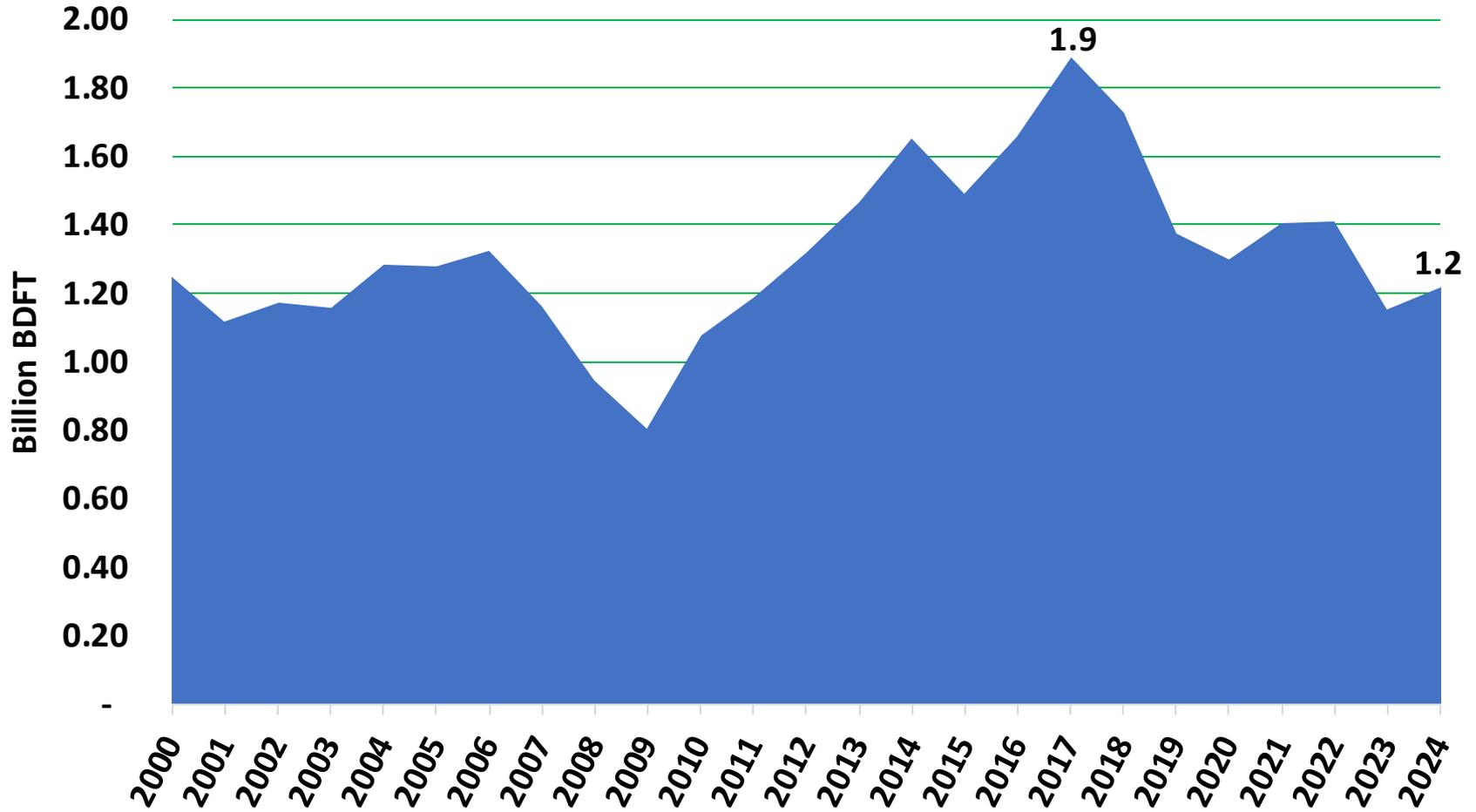
Hardwood Consumption by US Industrial and Grade Lumber Markets



Hardwood Exports



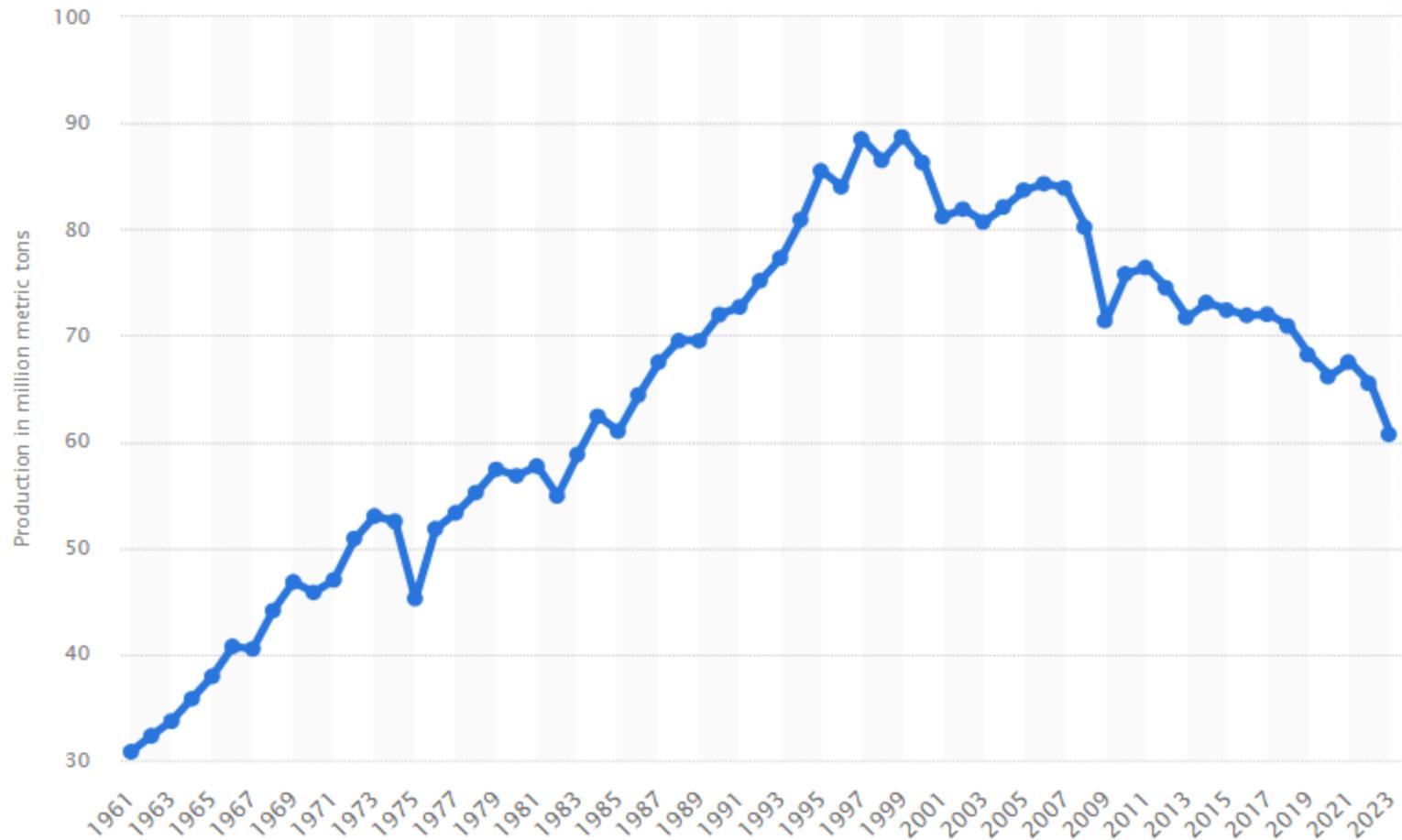
US Hardwood Lumber Exports



PAPER



Total production of paper and paperboard in the United States from 1961 to 2023 (in million metric tons)



PAPER



Luke, MD Paper Mill – Verso – 2019
Annually consumed ¾-1 million tons of wood fiber. 700 jobs

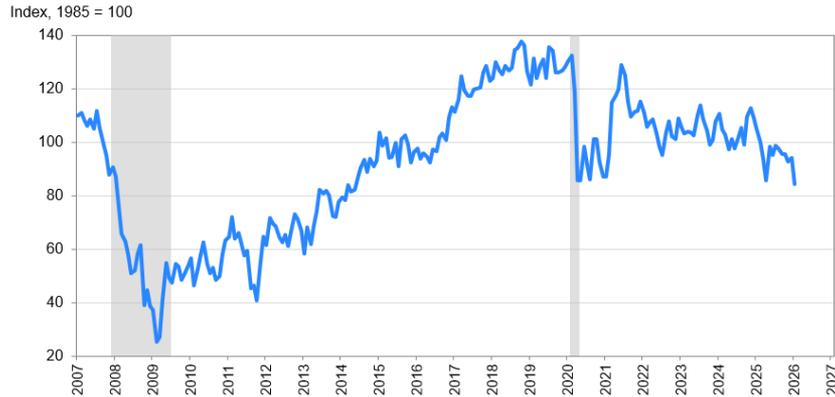


Roaring Spring, PA – Appvion Paper – 2021
Annually consumed 300k tons of wood fiber. 300 jobs



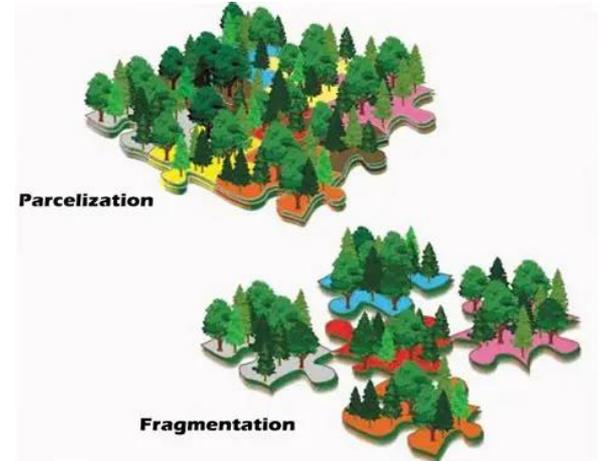
Market Interruptions

Consumer Confidence Index®

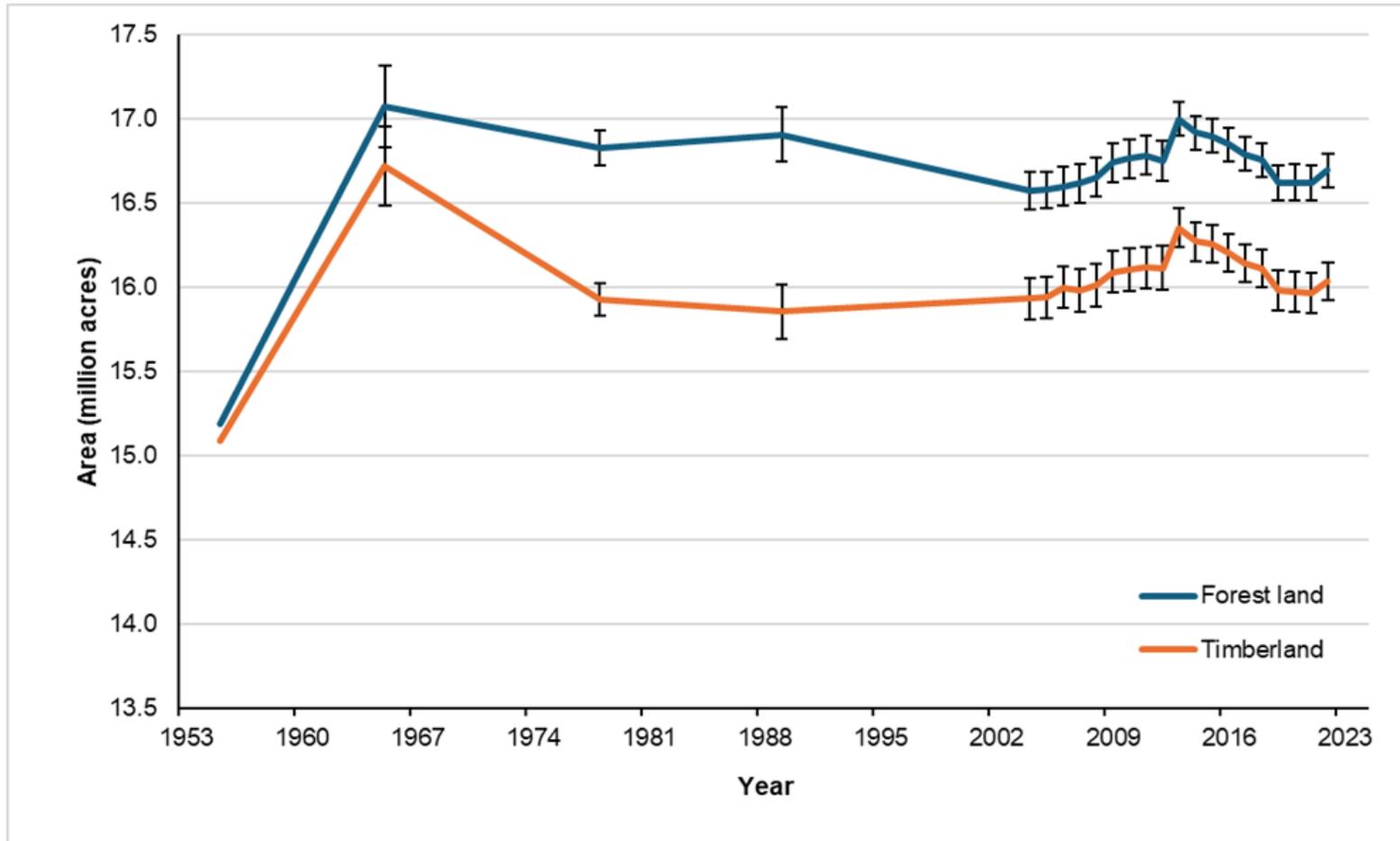


*Shaded areas represent periods of recession.
Sources: The Conference Board, NBER
© 2026 The Conference Board. All rights reserved.

Currently at 84.5.
12-year low,
driven by
inflation and
tariff-related
price spikes



Land Use



- 16,653,989 acres of forestland
- 15,989,390 acres of timberland

Pennsylvania's Resource



Volume of Standing Sawtimber in Pennsylvania 1955-2024
(Millions of Board Feet)



Annually

3-4 Billion BDFT growth

1+ Billion BDFT harvested

1+ Billion BDFT mortality

2 Billion BDFT
NET GROWTH

1955 1965 1978 1989 2004 2009 2017 2024

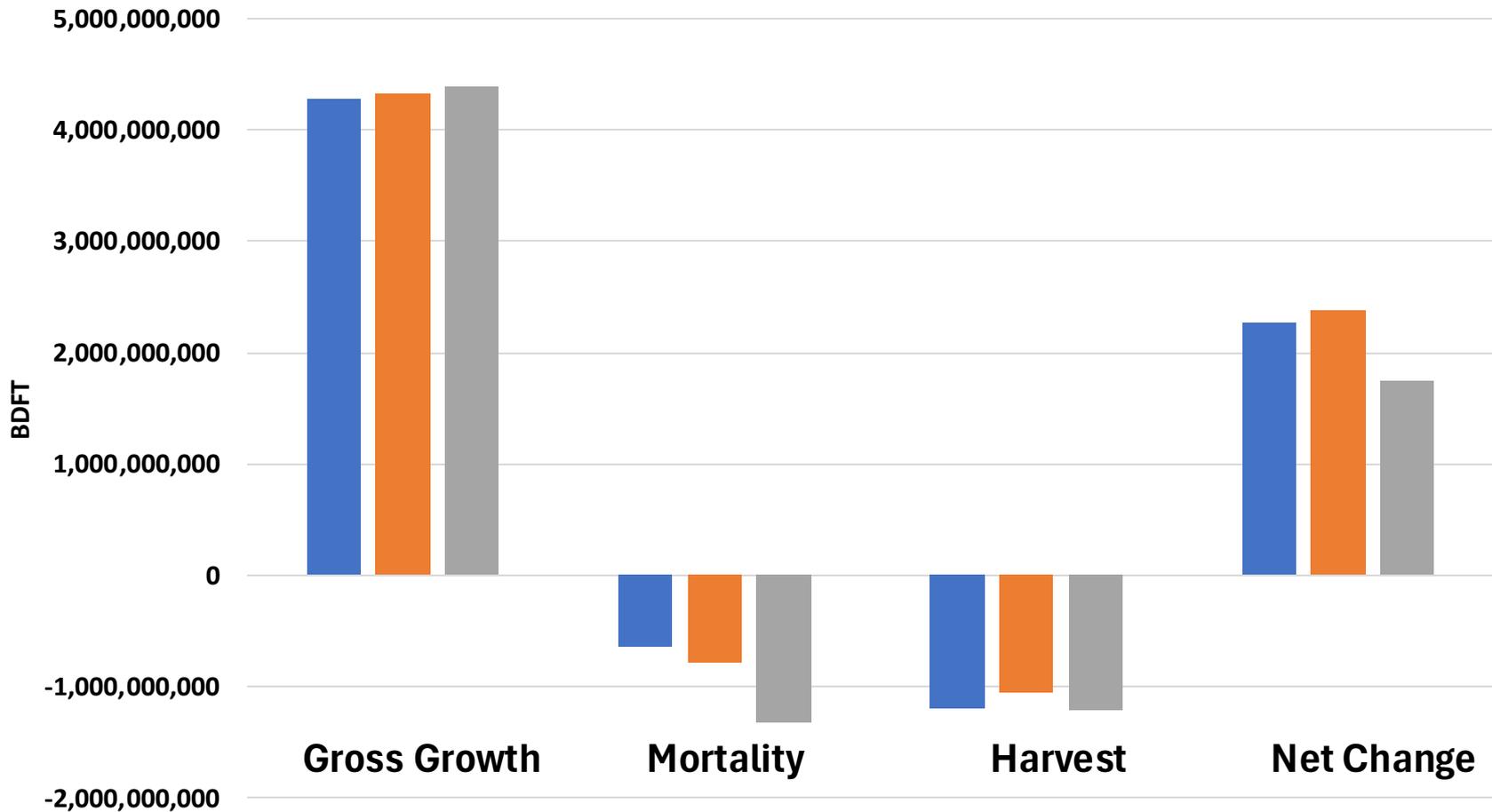
Today Pennsylvania has 5.85X more sawtimber volume than in 1955!

Forest Mortality Vs. Harvest



PA Forest Change

2010 2017 2024



1/3 of gross growth lost to mortality

2024 – 1.7 Billion BDFT Net Change

Forest Mortality Vs. Harvest



Average annual **MORTRALITY** of sawlog wood volume of sawtimber trees, in BDFT, by cause of death

Cause of death	Total	0-20 years	21-40 years	41-60 years	61-80 years	81-100 years	100+ years	Not available
Total	1,072,305,286	23,673,140	11,365,347	77,661,458	242,157,853	355,329,369	355,769,336	6,348,784
Insect	272,778,771	6,141,838	2,561,517	23,184,806	59,028,097	101,552,961	78,029,739	2,279,813
Disease	131,166,339	3,615,039	3,361,667	5,126,627	23,323,370	26,576,875	69,162,761	0
Fire	0	-	0	-	-	0	-	-
Animal	480,529	0	480,529	0	0	0	0	0
Weather	103,542,712	0	296,258	11,518,242	17,978,884	42,282,673	27,397,685	4,068,971
Vegetation	4,585,734	0	0	0	1,645,256	863,458	2,077,020	0
Unknown	559,751,201	13,916,262	4,665,377	37,831,782	140,182,246	184,053,403	179,102,131	0

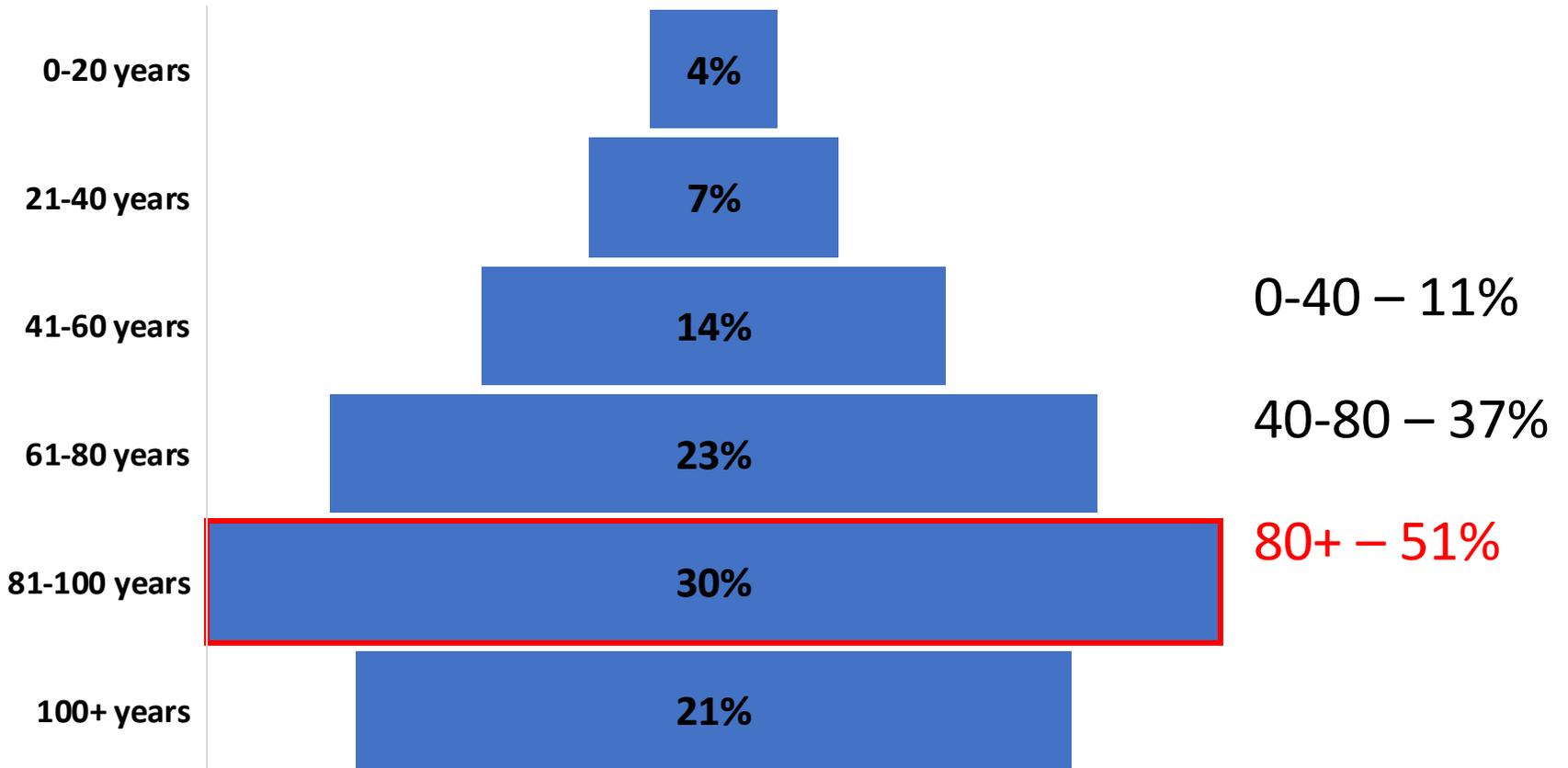
Average annual **HARVEST** of sawlog wood volume of sawtimber trees, in BDFT, by cause of death

Cause of death	Total	0-20 years	21-40 years	41-60 years	61-80 years	81-100 years	100+ years	Not available
Total	1,218,256,488	227,535,521	17,599,827	97,552,690	290,420,073	345,544,387	234,252,203	5,351,787
Disease	505,303	0	0	0	0	505,303	0	0
Weather	2,536,698	0	0	0	2,536,698	0	0	0
Unknown	12,636,581	4,739,960	0	1,664,577	3,025,138	0	3,206,906	0
Logging	1,202,577,906	222,795,561	17,599,827	95,888,113	284,858,238	345,039,084	231,045,297	5,351,787

Pennsylvania Forest Age Class



2024



- Invasive Plants
 - Increased competition
- Invasive Insects
 - Stress/mortality
- Tree Diseases
 - Chestnut Blight
 - Thousand Canker Disease
 - Oak Wilt
- Changes in Climate
 - Species shift
 - Loss of desirable species
 - Weather/wind events



Trees do not live forever

- **Underutilization**

Robust large diameter/high grade markets

+

Robust small diameter/low grade markets

=

Sustainable Forest Management

&

Increased Wood Utilization

Constant: need for forest management

**What's next & how do we
make this happen???**

What's next???



Softwood

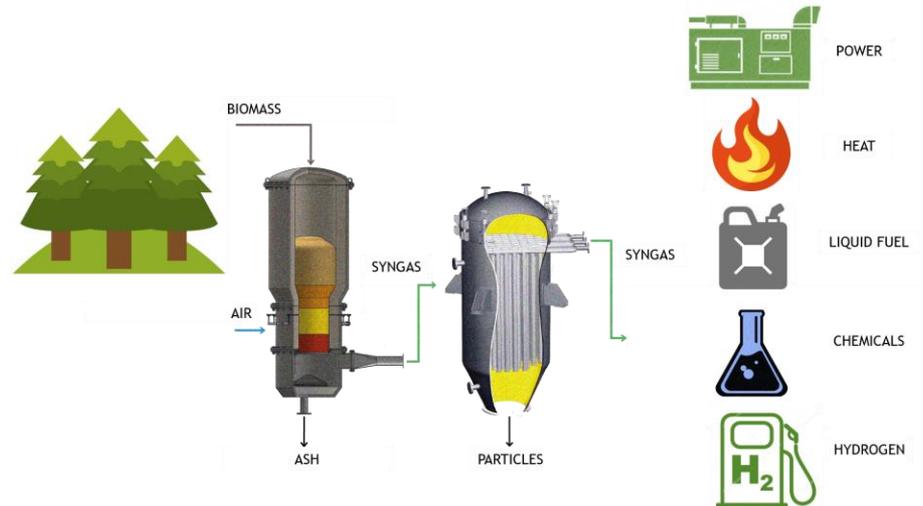


Softwood

Hardwood

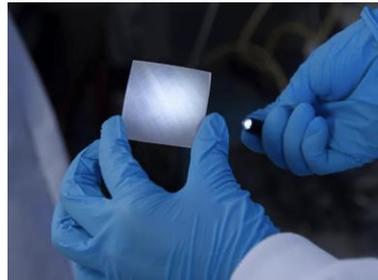


What's next???



What's next???

Wood innovation, utilization advancements and new product offerings are a MUST



STRONG WOOD MARKETS

(Grade material, low value, sawmill residuals, invasive woody stems)

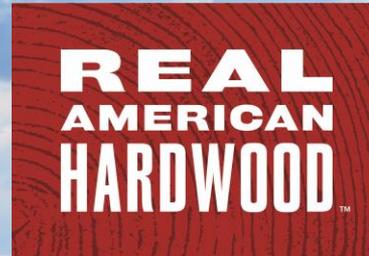
=

HEALTHY FORESTS

Clean air, soil, & WATER

Increased resiliency

Pennsylvania Hardwoods



Jonathan Geyer, Executive Director
PA Hardwoods Development Council

PA Department of Agriculture

2301 N. Cameron Street, Room 308

Harrisburg, PA 17110

717-787-3699

jongeyer@pa.gov

Thank you!