The Pritchett Team
Clicking on All Cylinders

Awarding Excellence 2011
Recognizing the Best of Florida
You know Caterpillar® and Prentice® for powerful and productive machines. And you know Thompson Tractor for responsive, on-site maintenance and repairs. But a closer look will show how focused Thompson is on providing the forestry industry in Alabama and Northwest Florida with the solutions it needs:

- Thompson has recently acquired the Peterson®, Doppstadt® and Woodsman® line of chippers/shredders
- Financing and equipment management programs designed specifically for your business
- The full line of powerful and efficient Cat® C-Series Skidders

Take another look at the many ways you can count on Thompson Tractor to provide the forestry solutions your business calls for whether you are at the stump, in the mills or processing debris.
Between the Lines

In the Zone

Growing up in Tennessee for three decades and living in Florida for more than 21 years, I have earned my stripes to be considered completely southerly. As it is for most Southerners, in the fall, college football is all that matters! This time of year I plan my Saturday around watching the pigskin sport, usually in my recliner with a remote so I can catch all the games on every channel. My wife says I get in my ZONE and she is right, I get caught up in it.

I discovered a ZONE earlier this season where others are caught up in their game. On page six you can peek inside the life of a man and his family that has forever changed the trucking landscape. It’s a parable of how a lifelong son of Lake Butler went from a simple pulpwood hauler to a national trucking powerhouse. It’s a story of building and sustaining one of Florida’s most revered family businesses. Hustle and heart truly sets this family apart.

While all roads at Pritchett Trucking lead to success, the feature is much more than a conversation about winning. It’s about hard work and working hard. It is about the man Marvin Pritchett is, not only for what he has accomplished, but the way he did it and the people he inspired along the way.

BEST OF FLORIDA

Outworking everyone else also applies to our Association award winners. In this issue, we are proud to recognize the leaders of the forestry team who have achieved excellence. Our 2011 Best of Florida award winners are featured on page 11. We were honored to put

By Jeff Doran
Executive Vice President
Florida Forestry Association
Marvin Pritchett never dreamed the family trucking business would have been so successful. He never thought about the money, just being the best at whatever he did. There has been adversity along the way, but the elder Pritchett just worked harder, and in his words, got luckier.

A go-getter excelled at Union County High School and earned a football scholarship to Chipola College. All the while, he was already building a bank account harvesting pine sap.

Man in Motion
Trading in shoulder pads for pulpwood trucks would be a move that Marvin would never regret. After serving in the Korean War, he bought out a local timber producer and inherited three trucks in the process. While working on his business degree at the University of Florida, he would check on the operations.
woods crews in the morning, drive to Gainesville to attend classes, and go back to the Lake Butler woods to work in the afternoon.

Seeing the growing need for mills to get raw material, Marvin got into the trucking business and the fleet grew to eight trucks hauling timber for Owens-Illinois. He added four more tractors and trailers to transport lime rock. In just a few years, that small operation would become one of the largest in the Southeast, producing more than 100 truckloads of wood each week.

But producers were placed on quotas in the late ’70s, and Pritchett’s production fell by more than 50%. Tackling the challenge, he focused his attention on the trucking business. In 1980, he secured hauling for a local chip and saw mill and he and his son, Jon, began building Pritchett Trucking Incorporated. They diversified their hauling opportunities to include more niche markets and they added more trucks to their fleet to meet the growing demand.

A Team Above All.
Above All a Team.

When Jon joined Pritchett Trucking, his sister Robin Wilson was working in dispatch and had been a receptionist. Younger brother Phillip also came on board in the 1990s. Two generations continue to work together at Pritchett Trucking to perpetuate the principles and practices of hard work, integrity and customer satisfaction.

Continuing to pull his share of the load, Marvin is the Chairman of the Board, Jon is President and CEO, and Phillip is Vice President and manages the daily operations. Robin is payroll manager. Their journey as shareholders began many years ago.

To put their early commitment in perspective, Robin, who was managing inventory at the NAPA parts store at one time, said the “young Philip was sweeping the shop when Elvis died and he served as the news bearer to all the other employees.” From sweeper he graduated to tire boy rolling the tires bigger than he was to the repair post. “He was always covered in dirt and grease from head to toe,” Robin said. “But he loved every minute of it.”

Jon recalls pumping gas and piling up short wood. “The Pritchett culture then was hard work and a strong work ethic and that is still the culture today,” Jon said. “There is no better way to learn than to get in the trenches and Daddy put us there.”

Growing up, neither the boys nor Robin ever considered doing anything but working in the family business. There was never any reason to want to do anything else. “Since 1978, I have been a dispatcher, a receptionist and for the last 20 years payroll manager,” said Robin. “How many families get to work together? We are partners and our family is really rock-solid from this. We bring out the best in each other,” Robin said with a smile.

Defense & Offense

At its peak, Pritchett Trucking was running almost 400 trucks. In the last few years, economic challenges have forced Pritchett Trucking to downsize the fleet. Like any successful team, they have learned to take it in stride.

Today, Pritchett Trucking has a fleet of 300 company owned and leased trucks with several divisions—one-third dump, one-third wood byproducts and one-third municipal solid waste—hauling a wide variety of materials. The company has exclusive contracts with seven different chip and saw mills in north Florida and south Georgia,
with two terminals, one in Lake Butler and one in Palatka.

Through good and bad times, their core operations have continued to be chips, lumber, shavings and sawdust. Don Pope, General Manager, Fiber Management, for Packaging Corporation of America, had this to say about the Pritchett culture:

"Marvin Pritchett’s success has a long history. When I started at the Valdosta Mill in 1980, Marvin was already a long-term supplier. He started with a bobtail truck, loading short wood for delivery to the mill at Valdosta. In 1980, Marvin won the contract to haul chips and bark from our new sawmill. Since 1980, our relationship with Marvin and his family has grown. Today, Pritchett Trucking is still a supplier with two conventional logging crews and hauling chips and fuel wood to our mill.

"Through the years, I have found Marvin, his family and his company willing to do the hard jobs that no one else wanted to do, and he has done this without complaining,” Pope said. “He has done these things with ease and with success. Marvin has always been a man of his word and one of the few men that you can still do business with only a handshake and know his word is his contract. Marvin has passed these values down to his children and it is reflected when we do business with his family and company.

“Our partnership with Marvin, his family and company has been about building a relationship with a knowledgeable, committed supplier adding value to our business and contributing to the success of Pritchett trucking."

Continuous improvement and taking care of each single customer is what Pritchett Trucking is all about. Phillip began a new venture with Plum Creek more than a year ago to improve the timber company’s trucking efficiency. “Trucking our product from stump to mill is a critical part of Plum Creek’s supply chain,” says Chris Everton, Senior Resource Manager at Plum Creek. “Over the past few years, we have been focused on minimizing our risk and driving out inefficiencies in that process. This focus caused us to look for someone who understood both the production and transportation elements in the logging industry. Pritchett Trucking was one of the few companies that came to mind. Over the last year and a half, the business relationship that has developed between Pritchett Trucking and Plum Creek has proved invaluable. They are a professional organization with the experience and know-how to get the job done. From the beginning of the program, Phillip has been there to address any potential issues or problems,” Everton said. “With his knowledge of both the mills and markets, any concerns that we may have had were quickly alleviated. He is definitely easy to work with."

The practice of running more miles loaded has gone so well, Phillip has helped the company expand. Thanks to their innovation and diversity they are beginning to see double-digit growth again.

Bold Moves

Success breeds success and the Pritchett’s good fortune is not confined to the family transport company. Back in 1992, with a fleet of all Mack’s in their operation, Jon and Marvin bought their first two dealerships from the Jacksonville Mack and Orlando Mack dealer who supplied them with trucks. A third dealership would be Mack Sales of Tampa and one would be built in Lake City.

Company growth and acquisition sparked the need to bring all the dealerships under the same banner. With the help of a Jacksonville public relations firm, Nextran Corporation was born and the Mack and Volvo truck sales and service centers along Interstate 75, Interstate 95 and Interstate 10 corridors had a new name.

Today, Jon is President and Chief Executive Officer of Nextran Corporation and Marvin is Chairman of the Board. Under Jon’s leadership, Nextran has grown to include 12 full-service dealership facilities serving most of Florida and including Atlanta and Birmingham territories.

The combination of franchise acquisitions and internal growth has resulted in a dealer network solely designed to provide seamless multi-state support for all customers and aggressive representation of Mack, Volvo, Isuzu and Mitsubishi products. Nextran has 500 employees, all of whom are committed to exceeding their customers’ expectations. The Nextran
team has developed one of the strongest truck dealership organizations in the country.

Nextran will soon finalize the acquisition of Alabama-based Premier Truck Centers, which primarily represents Volvo. Once the acquisition is completed, Nextran will add three Alabama locations in Birmingham, Tuscumbia and Madison to its network. In addition, Nextran’s International Division, located in Miami, is one of the largest exporters of new commercial trucks in the United States. The Company has more than 15 years of truck sales experience throughout Latin America, the Caribbean and beyond.

Giving Back
Another good business decision that Jon and Phillip have made is to be active in the Florida Trucking Association. Jon is a past Chairman and now serves on the Executive Committee. Philip is currently the Chairman of the Board. Both men credit Marvin for encouraging them to get involved and give back to the business that got them where they are. “I remember Daddy saying being active in a trade association carries the same principles as working in our business—what you get out of it is directly proportional to what you put in.”

The two were much younger when Marvin served as President of the Florida Forestry Association. But they remember fondly all the time he spent in Tallahassee and his Annual Meeting at Sawgrass. His presidential portrait graces the conference room as a friendly reminder of service, another term synonymous with the Pritchett culture.

Generous beyond words, Marvin can be found when the holidays roll around, smoking hundreds of hams and turkeys for former employees, customers and friends in Lake Butler. The local school system also benefits from his support of both agriculture and athletic programs at his old alma mater. He was honored recently when Union County High inducted seven members into the school’s newly established hall of fame.

The community has also benefitted from his service on the School Board and as a County Commissioner, and 17 years of leadership on the Board of Trustees of Florida Gateway College (formerly of the Florida Forestry Association. But they remember fondly all the time he spent in Tallahassee and his Annual Meeting at Sawgrass. His presidential portrait graces the conference room as a friendly reminder of service, another term synonymous with the Pritchett culture.

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Lake City Community College). Politically, he continues to be active in the Republican Party on the local, state and national levels. Jon and Phillip are also involved in a variety of community and political projects.

**On the Sidelines**

Next to Marvin, the biggest fans of Jon, Phillip and Robin are their spouses and children. Robin and her husband, Bill, have a daughter, Erika, who works at Pritchett Trucking and a son, Preston. Jon and his wife, Kelly, have two daughters, Alexandra and Christina. Phillip shares the house with three girls: his wife Emily and daughters Elizabeth and Catherine. Margaret Pritchett, Marvin’s wife of 43 years, rounds out the immediate family circle. Any given Saturday when the Gator’s play at home, you will find them all sharing the excitement of a family gathering in the Pritchett sky box at Florida Field. That is another strong family tradition imparted by Marvin that is being embraced by all the generations that follow.

**The Greatest Victory**

As our morning visit came to a close, I asked Marvin what was the secret to keeping Pritchett Trucking successful? Without a pause, he said Jon and Phillip and their innovation. “They are better businessmen and I learn from them every day,” he said. “They are not only my business partners, but my best friends. I have grown to trust their judgment from the good decisions they have made.”

Jon and Phillip are just as quick to point out how their dad’s core principles continue to drive the culture for them in all their decisions—integrity, hard work and good customer service. “As we continue to build on Dad’s core values, this company will continue to be successful,” Jon concluded.

At Pritchett Trucking, leadership is not a mantle that is passed from one generation to the next. It is a culture that exists within the company that strives to drive the values and goals of a family business. As a result of Jon, Robin and Phillip’s dedication and passion, all things are clicking on all cylinders. There is clarity—everyone is clear about what they want. There is alignment—everyone on the team is pursuing the same goal. There is focus—everyone knows what they need to do to get where they want to go.

A family business that has produced excellence since the beginning of its existence is a feeling few people get to experience. Seeing your children full of happiness and content to be where they are in life would make any parent proud. Knowing your greatest achievement is the relationship you have with your children. It’s obvious from the smile on Marvin’s face, you don’t get any “luckier” than that.

Jeff Doran is Executive Vice President of Florida Forestry Association.
Distinguished Service Award
Patricia J. “Patsy” Nathe

Patricia J. “Patsy” Nathe, a central figure in the success of R. J. Nathe & Sons timber and logging business in Pasco County, is this year’s recipient of the Distinguished Service Award, Florida Forestry Association’s highest honor.

In presenting the award, Jeff Doran, Executive Vice President, Florida Forestry Association, recognized Nathe for her reliability and 20-plus years of service in communication, government relations and leading the logging community.

“Patsy speaks up and out about the vital importance of our forest on Florida’s economy and environment every chance she gets,” Doran said. “Her imprint is carved on the Florida State Fair and every year over 35,000 people experience the Forest Discovery Center thanks to Patsy’s efforts to help build and maintain that outreach post.

“Politicians at the local, state and national level know Miss Patsy for her advocacy efforts on behalf of timber growers, wood producers and forest business. There has never been a time when our Association called on Patsy Nathe for help that she has not responded. I don’t know of any person in Florida who has given so much to preserve our heritage and our future,” Doran added.

Patsy Nathe received a standing ovation as she received the coveted DSA.

Florida Tree Farmer of the Year
Ellis & Sara Smith

Ellis and Sara Smith are the owners of a 99-acre tree farm just east of Tallahassee that has been certified under the American Tree Farm System (ATFS) for 31 years, and managed for timber and wildlife for 33 years.

The Smiths have not only managed their forest as an exemplary model for others, they have regularly been involved with their local government promoting private property rights so management options are available that allow for economic viability as well as environmental benefits. They regularly communicate with forestry professionals on current trends and technical matters related to the best management of their cherished land. They are active in the Florida Forestry Association, Florida Farm Bureau and the Forest Stewardship program.

The Smiths were also honored on October 18 as they hosted a tour of their award-winning tree farm. Congratulations to the Smith family, Florida’s Tree Farmer of the Year.

> continued on page 12
Florida Logger of the Year
T. W. Byrd’s Sons Logging, Inc.

A family oriented logging business that started with a crosscut saw in the early 1930s is now a thriving family business directed by four brothers and their sister, in the heart of logging country near Branford, FL. Jack, J.W., Earl, Paul and Benita Byrd all are directly involved in the daily operation of the various Byrd enterprises. Their 11 sons and two daughters are all involved as well.

The Byrd’s operation harvests timber on Foley Timber & Land property with three crews. The wood fiber goes to Buckeye, Gilman and various consuming mills. They haul timber for Suwannee Lumber with two to three crews, and two additional crews haul to RockTenn in Maxville and Fernandina Beach, FL.

The Byrds maintain exceptional regulatory compliance programs and recordkeeping; business management, personnel, resource and asset management; and a track record of sound harvesting practices.

We are proud to honor T. W. Byrds Sons, Inc. as Florida’s 2011 Outstanding Logger.

Legislator of the Year
Representative Steve Crisafulli

Representative Steve Crisafulli has proven through his unwavering commitment to agricultural issues that he truly is a friend of forestry.

A fourth-generation Floridian from Brevard County, Steve continues the legacy by managing the family’s agribusiness. First elected to the Florida House in 2008, Representative Crisafulli quickly established himself as a leader and staunch supporter of issues involving agriculture and property rights.

Entering his second term in the House, Steve was appointed Chairman of the House Agriculture and Natural Resources Subcommittee. In this role, Chairman Crisafulli was our go-to guy in the House, influencing every piece of legislation affecting forestry and agriculture. He also led the charge in the creation of the “Friends of Agriculture,” an unofficial Agriculture Caucus in the Legislature.

Crisafulli is a man of integrity and commitment to his family, wife Kristen and their two daughters, Carly and Kennedy, to his community and his constituents. The Florida Forestry Association is grateful for his support for the future of forestry and agriculture and we are proud to honor him as our 2011 Legislator of the Year.

Legislator of the Year
Senator Alan Hays

Senator Alan Hays is no stranger to the forestry and agricultural industry. Coming to Florida in the early ’70s, Alan was a charter class graduate of the University of Florida College of Dentistry in 1976. Now semi-retired, Dr. Hays enjoys spending time with his wife, Jeanee, their children and grandchildren, and is active in their community of Umatilla. Entering his eighth year in the Legislature, Senator Hays was first elected to the House in 2004 and to the Senate in 2010.

A testament to his leadership abilities, the freshman Senator was appointed Chairman of the powerful General Government Appropriations Subcommittee. This past year, Chairman Hays sponsored and passed several agriculture bills and was a vocal defendant of greenbelt and property rights.

No matter the issue, when it comes to the protection of agriculture, forestry and property rights, Chairman Hays is a fierce supporter. An honor that is long overdue, the Florida Forestry Association is grateful for his commitment to the forest industry and we are proud to honor him as our 2011 Legislator of the Year.
Sustainability Award for 2011
Pinellas County Utilities Department

Pinellas County Utilities Department is this year’s recipient of Audubon’s Sustainable Forestry Award. Audubon of Florida is the state’s oldest conservation organization, and places particular emphasis on the preservation of Florida’s landscape for the benefit of wildlife and people. For this reason, it recognizes one deserving sustainable forestry operation each year for its contributions to wildlife conservation.

The 12,500-acre Cross Bar/Al Bar property is owned by Pinellas County and is managed under the guidance of the Pinellas County Utilities Department. Both the Cross Bar and Al Bar ranches were previously intensively managed cattle operations with extensive improved pastures. An ecosystem management philosophy has been adopted with those principles being followed that generate all of the benefits that can properly be derived from this public ownership. With the guidance and vision of the Utility Department, Jack Vogel and John Holzaepfel and Natural Resource Planning Services, Inc. implemented and managed the project to the public land management model that it has become.

The production of ground water to service the needs of hundreds of thousands of people living in the Tampa Bay area is the primary purpose for public ownership of this property. The protection and enhancement of the wildlife habitat needs of both listed and non-listed species, as well as the production of significant forest resources, make up a complex management system that is responsibly administering the financial resources of the tax-paying public. In all, just over 5,200 acres of the tract have been planted to longleaf and slash pine on previously altered land. Approximately 6,800 acres of the tract exhibit natural conditions that are being managed for wildlife habitat, natural systems restoration and listed species habitat enhancement.

The Cross Bar/Al Bar program clearly demonstrates that public lands can be managed for timber, wildlife enhancement, public education and other uses while producing significant revenues and many environmental benefits. The message behind the program is that public lands can be very productive economically while maintaining a very high level of environmental protection.

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Timber Buyer  Cell Phone
At the recent Florida Forestry Association meeting in St. Augustine, I did a presentation looking at the implications of the reduced pine planting in the U.S. South. The presentation looked at the historic reasons for this reduction and the future implications.

In the agriculture community, changes in markets are reacted to very quickly. With increased usage of corn in the ethanol industry, we have seen corn planting acreage increase to record levels. As one agriculture official once noted to me, “Show farmers how to make a profit and in just a couple of years they will produce their way out of it.” However, this does not work in the forestry community, as crops planted today will not be ready for harvest for almost two decades. The forest industry is not one that can react quickly to market changes.

What we are seeing in the forestry sector is the same increase in demand that the corn farmers experienced. This increase is being driven by the energy markets as new pellet plants are being announced monthly. Later in this article, we will examine this demand in more detail.

From the table of tree planting acres you can see that planting acres last winter were at the lowest level since 1969. If this trend continues, we may face shortages of pine pulpwood in the future.

According to the staff at the Auburn University Nursery Co-op, these acres are an average of 97% pine.

Most planting acreage is pine as hardwood is naturally regenerated unless it is old bottomland agricultural sites, which accounts for almost all of the hardwood planting.

There has been some questioning of these acreage numbers. Each state has a different system for collecting their planting acreage numbers. I contributed to these numbers for several years and I can attest that some states do a good job of collecting data while for others I am not sure how they get to their numbers.

Florida is one of the states that does a good job in collecting planting data. In fact, they do the most detailed collection of planting data of any of the Southern states. The Division of Forestry (Florida Forest Service) does an excellent job and I have no doubt that their data is correct.

However, another indicator of this decline can be found in seedling production numbers. In 2001, the largest seedling producer in the nation at that time, International Paper, reported in their annual report that they shipped 425 million seedlings that year. In 2010, this same nursery group is now part of ArborGen and they reported that they shipped 218 million seedlings. This is a decline of 49% in seedlings shipped, which corresponds to the decline in planting acreage.

There have also been a number of nursery closures across the South. While an exact number is difficult to determine, it has been estimated that at least 20 seedling nurseries have closed in the past 10 years. In addition, many of the nurseries in production today have curtailed production over the past 10 years.

Where Did This Begin?

We hear a lot about unintended consequences and our current situation has its origin in this as well. In the late ‘80s, our federal government executed one of the largest CRPs (Conservation Reserve Program) ever attempted. This led to the largest amount of planting acreage ever carried out in the U.S. South. In 1988, more than 2.5 million acres were planted. This was more than double what was planted just one decade earlier in 1978. In total, this CRP program added an estimated 3 million acres of additional pine plantations.
During this period and on into the ‘90s, pine pulpwood shortages, especially during periods of wet weather, were not uncommon. During this period, overcutting of pine timber growing stock was common.

As these 3 million acres continued to grow, they helped to push pulpwood prices to new lows starting in the late ‘90s, as these stands had to be thinned to continue CRP payments. There were cases of landowners in Georgia having to pay loggers to thin their CRP stands. This glut of pulpwood also coincided with major changes in timberland ownership as many integrated forest products companies disposed of their timberlands. The oversupply of pine pulpwood may have given these mills a false sense of security.

The Current State of Things

At present, there are strong markets for pulpwood in many markets across the South. With the decrease in clean chips from sawmills due to the reduced operation hours, many pulp/paper mills are relying on roundwood to make up the shortage. To be able to supply this level of roundwood in a market with minimal need for sawtimber, many timberland owners have used thinning as their main form of harvest.

This approach of heavy thinning is creating larger inventories of sawtimber that are being carried forward for harvesting at a later time. As with many areas of our economy, we are kicking the can down the road. This also has further reduced the demand for seedlings, as thinned acres are not replanted.

Planting densities have continued to decrease across the South. Most TIMO and REITs have decreased their seedlings planted per acre, with some reducing it to less than 300 seedlings/acre. They are also planting CMP (Control Mass Pollinated) and SE (Somatic Embryogenesis) seedlings. These high-priced seedlings are being grown strictly for the sawtimber market.

While our government has maintained a CRP program in recent years, the program has changed from a program focused on timber production to one focused on ecosystem restoration. This has resulted in a planting regime that promotes planting longleaf at no more than 500 stems/acre. There is nothing wrong with this approach but it does little to add to the timber base in the near term due to the long growing cycle for longleaf.

Accuracy of USFS FIA Data?

New energy startups have relied on FIA data for site placement. Having reliable data on forest inventories and removals is important in light of the major capital investments in these facilities.

John Morris, VP, Foley Timber and Land Company, has examined FIA data in his recent report, Florida’s Pine Plantation Resource, Short of Sustainability. Morris examined the pine resource in Florida by looking at both the plantation and natural pine stands.

What he found was that FIA data is not giving a current picture of removals from plantations. The FIA data uses an average of removals over a survey period of 12 years. Using this average, FIA shows removals for 2007 of 14.9 million tons but a private source that tracks mill usage shows 2007 removals of 17.1 million tons. This is a difference of 2.8 million tons.

He also found a discrepancy in the removals from plantations versus natural stands. FIA estimates that 55% of pine removals in 2007 were from plantations, again using the 12-year average. However, an analysis of current removals from the Master Logger survey shows that 2007 removals from pine plantations were actually 90% of removals.

Based on John’s analysis, he estimates that Florida plantations were overharvested in 2007 by 3.8 million tons (see chart). He further forecasts that this number would increase in the future as regeneration acreage continues to decline. Adding increased usage from bioenergy and biofuels operations “will further negate sustainability.”

What Might the Future Hold?

If the solid wood markets do not recover soon and planting acreage continues its decline, what will be the result? There are a number of possible scenarios.

There will be a continued decline in sawtimber pricing while pulpwood pricing increases. In spot markets recently, we have seen pine pulpwood prices near those of small sawtimber and in one case exceeding it. This is especially prevalent during periods of wet ground conditions.

The specifications that differentiate pulpwood from small sawtimber will probably change with the smallest of this sawtimber moving into pulpwood. We are already seeing this occur in some areas.

As noted earlier, the increased demand in the energy markets is increasing the demand on pine pulpwood, specifically facilities that use pine pulpwood in...
the production of pellets. The chart shows how the European pellet market is expected to grow in the immediate future. At the lowest level, usage is projected to reach 32 million metric tons and at the highest level, usage is projected to reach 85 million metric tons.

Why is the southern U.S. impacted by this demand? The chart shows the ocean freight rates from various wood producing regions of the world. There is only one area of the world that has lower freight rates than the southern U.S. and this is the Soviet Union.

As Mark Twain once noted, “The reports of my death are greatly exaggerated.” The same can be said for the pulp/paper industry in the U.S. South. While there have been some closures of mills during the past decade, production has not declined that much. The chart shows daily usage of all the pulp/paper mills in the South.

The world’s largest pellet mill (1 million tons/year) is scheduled to open in Russia near the border with Finland before the end of the year. However, they face two challenges that pellet mills in the southern U.S. will not face. The first is that just as Napoleon and Hitler learned the hard way, winters in western Russia can be brutal. Not only does the weather impact wood deliveries to the mill but it also makes it difficult if not impossible to get ships in and out of the harbor.

The second challenge is even greater. In 1986, the world was shocked when we learned of the disaster at Chernobyl. The disaster was hidden from the world for several days until radiation detectors at a Swedish nuclear plant started alarming. Most of the radiation from the plant drifted north of the plant into the western area of Russia.

Previous pellets from this area of Russia showed low levels of radiation. However, when these were used in pellet stoves, the radiation collects in the ash and over time increases to dangerous levels. In Italy, a supplier was forced to recall Russian pellets due to this issue.

Additional dangers to forest plantation acreage may be in our current commodity pricing. As the chart shows, corn commodity pricing has reached record high levels. Cotton in this past year exceeded the record price of $1.85/lb., which was set during the Civil War. With corn and cotton at all time highs, we are already seeing acreage revert from timberland back to farmland.
from 1991 to 2007. Freesheet (fine papers) production has declined as evidenced by the closure of the Franklin, Va. mill. Linerboard appears to be holding its own. Pulp grades are the golden boy at present. As evidence of this, IP has announced the reopening of one line at the Franklin mill to produce fluff pulp.

The chart shows the commodity pricing for softwood pulp from 2006 to present. Like agricultural commodity pricing, pulp pricing per metric ton has approached record levels.

At these levels of pricing, pulp mills are making more than $300/ton. Typically, a pulp mill, unless they are making specialty grades, will use around four tons of green wood to make a ton of pulp. As I told the group at the FFA meeting, these mills could theoretically pay an additional $75/ton for wood and remain in the black. This raised many eyebrows at the FFA meeting, but just because they are able to, does not mean that they will.

However, for those of us in the forestry business longer than 15 years, we have seen the effects of limited pulpwood supply. In January of '95, I was the timber sales forester for a large timberland owner in Georgia. In 1995, the pulp/paper industry was doing really well with several companies setting record profits that year. The landowner I worked for sold a tract of pine pulpwood just outside of Waycross, Ga. for over $35/ton. Adjusted for inflation, this price would now be over $50/ton, or over $100/dry ton on the stump. Delivered price in today’s dollars would easily be over $140/dry ton. How many energy operations could pay this level of prices for their delivered feedstocks?

Faced With This, What Should Landowners Do?
The first and most important item is planting density. Lower planting densities limit a landowner’s options. You cannot change stand density when stands are established, however there are a number of factors
that can reduce it. These include lack of seedling survival, fire, insect, weather and disease.

One positive thing that has come from the reduction in planting is that good quality, open pollinated seedlings are now available to private landowners. Integrated forest products companies would use their best seedlings for planting on their lands, and now that there are no more integrated companies, landowners have access to these best seedlings. When stands regenerate, the lowest cost input is typically seedlings with most good quality OP seedlings costing between 4 to 5 cents each.

If the landowner’s objective is to grow sawtimber, then they should consider an intercropping approach. An example of this would be the planting of high-end seedlings such as Mass Control Pollinated (MCP) or Somatic Embryogenesis (SE) on 20’ rows. Then the landowner plants between these rows with good quality Open Pollinated (OP) seedlings. This would give the landowner a harvestable crop of pulpwood in 10 to 14 years while still producing the sawtimber at a future time. The advantage of this approach is that crown closure occurs much faster, eliminating or minimizing the need to control the understory.

In the ‘80s and ‘90s, a number of the integrated forest products companies were really pushing the envelope on intensive forest management. Landowners may need to bring back some of these intensive management options to fill the gap. These could include repeated soil tillage, fertilization, tip moth control, herbaceous and weed control. Research has shown that pulpwood can be produced in as little as 10 years under intensive management.

**Faced With This, What Should Pine Pulpwood Users Do?**

Users can wait until pricing and availability become a problem or they can start to work on minimizing the impact. There are a number of approaches a user can implement to overcome this impending problem.

One of the more dramatic approaches would be the purchase of timberland. Just as the integrated forest products companies owned timberland, energy facilities could do the same. The advantages of this approach are the ability to harvest whenever needed and stands can be planted and managed to maximize pulpwood production. However, a company would face the same tax implication that contributed to the sale of timberland by these integrated forest products companies.

A less costly approach would be to work with the major holders of timberland. Private landowners hold 71% of the timberland in the South, so working with these owners to supply feedstocks is key. In the ‘80s and ‘90s, many of the forest products companies had landowner assistance programs. These programs had many different forms but most included the right of first refusal on all timber sold by the landowner. These programs offered seedlings and planting assistance at no or reduced cost to the landowner.

Providing seedlings to landowners has another benefit. Seedlings can be selected that maximize fiber production. Most tree improvement programs have focused on selecting trees for the production of sawtimber. Attempting to identify seedlings that maximize fiber production should be an objective of all pulpwood users.

The BCAP program may be an aid for the energy users but one needs an understanding of the species and management regimes that will work. Also, future funding of this program is a real question.
For energy facilities, energy grasses may be needed to fill the gaps that are sure to occur. These can give full productivity in as little as three years. Eucalyptus and fast-growing hardwoods may also work to fill the gap but they take a longer time, a minimum of seven years to begin harvest. Eucalyptus can only be grown in the Deep South, usually defined as below Interstate 10.

Conclusion

While many economic development people refer to areas of the South as the Saudi Arabia of pine trees, this is not necessarily the case. This future shortage will affect all users of pine pulpwood, the existing pulp/paper industry and the new energy start-ups. However, the pulp/paper industry can afford to pay more for feedstocks than the energy industry.

At a recent Georgia SAF meeting, the question was asked as to what can be done to change this scenario. After much discussion, it was decided that when it comes to pine pulpwood users, the market will select the winner and losers. This is, of course unless the government starts to play a role and picks the winners. Let us hope that this does not happen.

Landowners need to position themselves to take advantage of this situation. Unlike REITs and TIMOs, landowners have more flexibility to adjust cutting cycles and planting densities and capitalize on this situation.

About the Author: Dean McCraw is the president of McCraw Energy LLC. He has more than 30 years of experience in forestry, which includes the management of biomass harvesting operations, woodyards and the production of more than 500 million seedlings. He can be contacted at dean.mccraw@mccrawenergy.com.
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Whether harvesting trees or pulling a load, every logger’s goal is to maximize productivity and keep operating costs down. And in Florida, that’s no easy task when faced with natural disasters and varying terrain.

When out in the woods, it’s important to have the right equipment for the job at hand to be as fast and efficient as possible. And when it comes to pulling loads, loggers aim to move the most wood at the lowest cost per ton.

Here are a few key considerations for making the most of your skidder purchase.

**Fuel economy.** When looking at opportunities for lowering costs, having a fuel-efficient machine can be an easy way to see a measurable improvement. Many equipment models will even provide higher production and reduced cycle times if you focus on finding a fuel-efficient model. However, power should not be sacrificed for fuel efficiency, so be sure that horsepower is still within a 130-200 hp range.

**Dependability.** For a logger to be successful in meeting production goals, you need a skidder that’s going to take some abuse on the jobsite. And, to keep business expense down, equipment that’ll last the test of time is critical as well. During your next purchase cycle, look for heavy-duty axles, durable hydraulic pumps and large-diameter arch pins that are configured specifically for the skidder, rather than an adapted general-purpose version used on other types of machines.

**Ease of use.** Get the most out of each day in the woods by finding a skidder that’s easy to use and has been built with your operator in mind, reducing operator fatigue. While there are many options and features in the market place, a new autoshift option allows operators to use their right hand to run the grapple and focus on pulling the load, making the skidder easier to use than ever before.

**Dealer support.** In addition to equipment features, it’s also important to consider the service and support available from your local dealer. After all, many salesmen can become absent after the initial purchase. Find a dealer who understands your unique challenges as a logger, offers flexible financing options and stocks an impressive parts inventory to get you what you need after the sale. The right dealer will become a partner for your business and can make life in the woods more productive.

Investing in a skidder that’s fuel-efficient, durable and easy to operate with support that extends into the woods will ultimately lead to more uptime and increased productivity. And at the end of a long nine- to 10-hour day, loggers with an exceptional skidder will be able to measure their success in greater profitability.

Brandon O’Neal is the product marketing manager for John Deere Construction & Forestry.
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