

**5TH  
ANNUAL  
CONFERENCE**



# MAPPING THE COURSE

**TIMBER**



**FIBER**



**PROCESSING**



## **Optional Workshop**

**January 24, 2018 • Same Location**

### **Sawmilling 101:**

Introduction to  
Softwood Sawmill Operations  
and Financial Performance

## Timberlands, Forest Products Processing, and Fiber Issues for 2018

**WFCA** Western Forestry and  
Conservation Association



**WOOD  
RESOURCES  
INTERNATIONAL**

Attend this conference for  
in-depth analysis on forest products  
market challenges, opportunities, and  
threats for 2018 in the North American  
West Coast timberland region.

**January 25, 2018  
Heathman Lodge  
Vancouver, WA**

**5TH ANNUAL  
CONFERENCE  
JANUARY 25**



# MAPPING THE COURSE

## Timberlands, Forest Products Processing, and Fiber Issues for 2018

### Agenda

- 7:00** **Networking buffet style breakfast**
- 8:30** *2018 Stressors and Opportunities for North American Forest Industry*  
**Paul Quinn,**  
Analyst, RBC Dominion Securities Inc.
- 9:00** *Strategic Issues for US PNW Timberlands in 2018 –*  
**Mike Mackelwich,**  
Vice President, Timberland Operations, Pope Resources
- 9:30** *Outlook for Sawlog and Pulpwood Prices in Western US and Western Canada –*  
**Hakan Ekstrom,**  
Wood Resources International
- 10:00** **Break**
- 10:30** *BC Interior Log Supply Issues –*  
**Brad Bennett,** Woodlands Manager, Interfor Corporation, Adams Lake Division
- 11:00** *BC Coastal Log Supply Issues –*  
**Brian Brown,**  
Manager, Fibre & Log Supply,  
MacKenzie Sawmill Ltd
- 11:45** **Lunch**
- 1:00** *US PNW Sawmill Sector: Eastside and Westside Market Dynamics -*  
**Tim Atkinson,**  
Vice President, Sales, Stimson Lumber Co
- 1:30** *US PNW Pulp Mill Sector: Entering the Golden Age of Plentiful Fiber? –*  
**Jeff Marthaller,**  
KapStone Paper and Packaging
- 2:00** *Will There be Enough Log Supply to Increase Lumber Production? –*  
**Rocky Goodnow,** Forest Economic Advisors
- 2:30** **Break**
- 3:00** *Why Build an Export Pellet Plant in the US Pacific Northwest? Why Not? –*  
**Seth Walker,** FutureMetrics
- 3:30** *The Trade of Softwood Lumber in North and South Asia to 2030 –*  
**Robert Hagler,** ForestEdge LLC
- 4:00** Reception and networking

We encourage you to arrive the evening before to network with others. Many will already be at the venue and you can arrange to meet other attendees ahead of time. We are providing a buffet-style sit down breakfast prior to Thursday's Mapping the Course conference as another opportunity to network. Many attendees from prior years have suggested we increase networking time, while holding the conference to one day.

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# OPTIONAL WORKSHOP JANUARY 24

## Instructors

**Bryan Beck, President** – Since joining The Beck Group in 2003, Bryan has been involved in a wide variety of projects involving sawmills including feasibility studies, capital project planning, acquisition due diligence and benchmarking. Prior to his time with The Beck Group, his experience includes positions at Northwest sawmills and in residential construction.

**Roy Anderson, Vice President** – Roy joined The Beck Group in 2006. Since that time he has been involved in BECK's sawmill benchmarking studies, timber supply and demand studies, and log procurement planning. Roy started his career in log procurement in the hardwood industry in the Midwest, and also has extensive experience with woody bioenergy and wood pellet projects.



## Sawmilling 101: Introduction to Softwood Sawmill Operations and Financial Performance

### Agenda

#### 9:00 Sawmilling Overview

##### A. *What are the Basic Manufacturing Processes?*

Follow a log along the manufacturing processes from delivery to the mill, through sawmilling and kiln drying, and on to the planer and shipping.

##### B. *What does a Successful Sawmill Manager Pay Attention to?*

An introduction to key sawmill performance metrics and a sample sawmill income statement to illustrate how key metrics impact financial performance.

#### 10:15 Break

#### 10:30 Markets & Manufacturing in North America

##### C. *Where Does the Lumber End Up?*

A review of the primary end users of lumber to include residential building, remodeling and repair and industrial distribution channels. Consumer preferences and green labeling round out the picture of market forces.

##### D. *What are the Characteristics of Markets and Manufacturing in the Various Regions of North America?*

An overview of each major region is provided to cover population trends, characteristics of mills, regional market drivers and species mix.

#### Noon Lunch

#### 1:00 Key Sawmilling Metrics in Detail

##### E. *A Close-up of Key Metrics.*

The instructors will draw upon actual sawmill operating statistics from 20 years of benchmarking study data and how those factors impact financial performance.

##### 1. *Log Supply and Pricing.*

Logs are typically 60 to 70 percent of a sawmill's total operating cost. This session will focus on the characteristics of logs that drive value, and the process of identifying the right log at the right price for the right mill.

##### 2. *Lumber Recovery.*

What forces impact the amount of lumber recovered from each log? This session will focus on how mills measure and maximize the volume and value of lumber produced.

##### 3. *Productivity and Manufacturing Costs.*

This session will review the key factors that drive mill productivity and manufacturing cost including log and lumber mix, technology, labor, energy, maintenance and supplies.

##### 4. *Lumber Products and Sales Values.*

A look at key characteristics and market values for major lumber product categories including commodity and specialty product lines.

##### 5. *Sawmill Byproducts.*

This session will focus on end uses and values for byproducts including chips, sawdust, shavings, bark, and hog fuel.

#### 3:00 Break

#### 3:30 Characteristics of Top Performers

##### F. *What are the Characteristics of Top Performing Sawmill Operations?*

The instructors will draw on more than 20 years of benchmarking experience to illustrate differences in key performance metrics between average and top performing sawmills, and will present several case studies of top performers.

#### 4:30 Adjourn

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# Sponsorship Opportunities

## Timberlands, Forest Products Processing, and Fiber Issues for 2018

Sponsorship Features	Platinum \$2,500	Gold \$2,000	Silver \$1,250	Bronze \$900
Registration fee included	Two Registrations	Two Registrations	One Registration	One Registration
Logo listed on sponsor page inside the conference onsite book	◆	◆	◆	◆
Listing as break sponsor in conference onsite book	◆	◆	◆	
Room signage listing as break sponsor	◆	◆	◆	
Full page color advertisement in conference onsite book	◆	◆		
Company materials available on display table	◆			
2 X 3ft poster on either side of stage with sponsor advertisement	◆			
Acknowledgement as key sponsor in conference opening	◆			
Logo in advertising emails and materials	◆			

Please contact Richard Zabel at 503-226-4562 or [richard@westernforestry.org](mailto:richard@westernforestry.org) if interested in these sponsor opportunities



## MAPPING THE COURSE

**January 25, 2018**  
**Heathman Lodge • Vancouver, WA**

# 5TH ANNUAL CONFERENCE REGISTRATION

Sponsored by:



**WFCA** Western Forestry and  
Conservation Association  
**WOOD  
RESOURCES  
INTERNATIONAL**

NAME \_\_\_\_\_

ORGANIZATION OR AFFILIATION \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

EMAIL \_\_\_\_\_ TEL \_\_\_\_\_

Please List Any Special Dietary Needs: \_\_\_\_\_

## REGISTRATION

### MAPPING THE COURSE 1/25/18

**ON or BEFORE 1/8/2018** \$525 \_\_\_\_\_

**AFTER 1/8/2018** \$675 \_\_\_\_\_

### OPTIONAL WORKSHOP 1/24/18

**ON or BEFORE 1/8/2018** \$425 \_\_\_\_\_

**AFTER 1/8/2018** \$525 \_\_\_\_\_

Includes reference materials and lunch.

Call: 888-722-9416 or 503-226-4562  
or melinda@westernforestry.org

**Western Forestry and  
Conservation Association**  
4033 SW Canyon Rd. • Portland, OR  
97221

## PAYMENT METHOD

### 1. Please make check payable to:

WFCA  
4033 SW Canyon Rd.  
Portland OR 97221, USA

### 2. Purchase order # \_\_\_\_\_

### 3. Charge to: MC VISA AmEx (please circle)

Account # \_\_\_\_\_

Expiration Date \_\_\_\_\_ Security Code \_\_\_\_\_  
(on back of card)

### 4. Register at [www.westernforestry.org](http://www.westernforestry.org)

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Heathman Lodge • Vancouver, WA**





# Mapping the Course: Timberlands, Forest Products Processing, and Fiber Issues for 2018

## Location:

The conference and optional workshop will both be held at the Heathman Lodge in Vancouver, WA. The Heathman is located at 7801 NE Greenwood Dr. Take SR-500 East off I-5 in Vancouver. Exit at NE Thurston Way and go north to NE Parkway DR. Turn left on Parkway and the Lodge is on the left. The Heathman can be viewed at: [www.heathmanlodge.com](http://www.heathmanlodge.com)

## Lodging Information:

Reduced rate lodging is available at the Heathman by calling 888-475-3100 or 360-254-3100 and by mentioning Western Forestry and Conservation. The rate for a single or double room is \$133 plus tax. After January 3, 2018, reduced rate rooms will be subject to availability.

## Registration and Cancellations:

The registration fee for 1/25/18 is \$525 if received by January 8, 2018 or \$675 if received after January 8, 2018. The registration fee includes a book of speaker materials, lunch and reception. The registration fee for the optional 1/24/18 workshop is \$425 on or before 1/8/18 or \$525 after 1/8/18 and includes reference materials and lunch.

Checks should be made payable to Western Forestry and Conservation Association. Purchase orders, VISA/MasterCard, and American Express are accepted. Tax id # 930-331-712. Cancellations received on or before 1/8/18 are subject to a 15% service charge. Cancellations after 1/8/18 will be charged the entire registration fee, but substitutions are always welcome.

## Society of American Foresters CFE Credits:

Attendees are eligible for 5.0 CFE credits for Mapping the Course and 5.5 CFE credits for Sawmilling 101.

## Registration Questions?

Call Melinda at (888) 722-9416 or (503)226-4562  
[melinda@westernforestry.org](mailto:melinda@westernforestry.org)

## Western Forestry and Conservation Association

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