WISCONSIN COUNCIL ON FORESTRY
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Industry Initiative –
Support, Develop and Diversify Wisconsin's Forest Products Industry

- Critical part of our state and local economies, health of our rural communities
- Cornerstone to being able to sustainably manage our forests and maintain healthy, versatile, and resilient forests
- Managing our forests tied directly to recreational use and WI resident's well being, access for recreation, wildlife & wildlife habitat, climate, and so much more.
- Local, regional, and global changing and challenging markets along with complex social, political, economic, and ecological considerations.
  - How do we adapt, thrive, and fit what we have done so well in Wisconsin for so long into this future world?

January 2024

Wisconsin State Legislature

Search statutes: '13.92' or 'public parks' Search

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26.02 Council on forestry.

(1) Duties. The council on forestry shall advise the governor, the legislature, the department of natural resources, and other state agencies, as determined to be appropriate by the council, on all of the following topics as they affect forests located in this state:

(a) The protection of forests from fire, insects, and disease.

(b) The practice of sustainable forestry, as defined in s. 28.04 (1) (e).

(c) Reforestation and forestry genetics.

(d) Management and protection of urban forests.

(e) Increasing the public's knowledge and awareness of forestry issues.

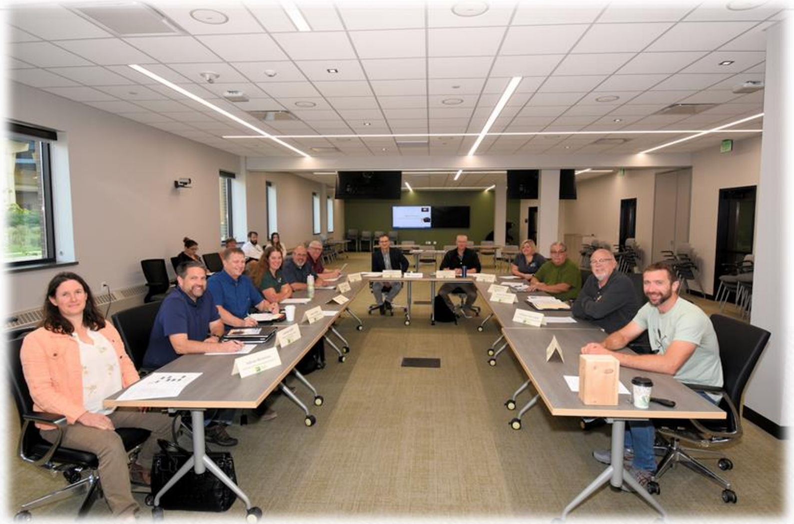
(f) Forestry research.

(g) Increasing the economic development of the forestry industry and employment in the forestry industry.

(h) Marketing and use of forest products.

(i) Legislation that impacts on the management of forest lands in this state.

(j) Staffing and funding needs for forestry programs conducted by the state.



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Based on feedback heard at 9/13/23 Council brainstorming session

Color Coding: ***Questions posed 9/13.*** Suggested responses based on Council feedback

Discussion Outline

1. Tom Intro
2. Discussion Questions from 9/13/23. *In addition to discussing the merits of what was shared, are there general comments or thoughts expressed in the sessions that differ from the consensus?*
    a. Question 1:
        i. ***Do we want to continue our primary focus to be on an industry related initiative?*** Yes
        ii. ***Should we pivot to a different focus?*** No
        iii. ***Related or unrelated to the forest industry?*** Related
    b. Question 2:
        i. ***If the focus is to be on an industry related initiative, is a strategic plan and roadmap the best option?*** Yes
        ii. ***If not, what is?***
    c. Question 3: ***What is the Council's role and abilities where state budget issues are involved?*** Advocacy, bring stakeholders together, educate the public and legislators.
    d. Question 4: ***What has prevented us from being more successful?***
        i. Market factors: competition (southern market, big manufacturers, labor shortage), regional market constraints (mill closures, etc.)
        ii. Messaging: hard to visualize and get excited about strategic planning.
        iii. Planning Process: stakeholders not supporting/abstaining/not unified, lack of time & capacity & staff, need for grassroot momentum.
        iv. Political: convincing the Joint Finance Committee, overcoming controversial issues (conservation easement, etc.).
    e. Question 5: ***Can we overcome these challenges? How?***
        i. Find a collective voice & vision with partners & stakeholders (outside lobbyists, interest groups, non-traditional partners, loggers & mills, counties, legislators—especially those on Council).
        ii. Seek the following from the strategic roadmap:
            1. Overall assessment, identify shortfalls & next steps.
            2. Recommendations that are specific, convincing, achievable and actionable.
            3. Should a plan be informational or directional or both?
            4. Should it focus on *one ask* or multi-prong?
            5. What value would a consultant bring to the process (time, expertise, quantifying issues/future modeling, understanding of marketing & social science)?
        iii. Use market-friendly terminology, and an understanding by the public and legislators/JFC of impacts to *them.* Don't want to lose opportunities because Wisconsin wasn't poised when an opportunity arose.
        iv. Provide open & honest communication.
        v. Form committees to work smaller issues.
        vi. Advocate for staff to assist with planning and implementation.
        vii. Look for success stories from other states.
    f. Question 6: ***What should we do next?***
        i. Promote a forestry workforce (especially considering today's generation).
        ii. Focus on *future* markets (and positioning the resources for them): biochar, mass timber/building codes, packaging, bio-energy/biofuels.
        iii. Draft a statement on the Council's vision for future engagement related to the forestry industry and the state budget.

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Industry Initiative – Proposed Next Steps

- **Condense strategic plan and roadmap effort to a limited scope study** to -
  - *Determine the factors that are preventing potential new, and existing, forest products companies from locating and expanding in WI.*
    - Focus on 1) regulatory and permitting, and 2) fiber availability (to address in part, competition concerns, with an emphasis on low grade fiber markets and a forward-look at factors impacting availability)
    - Develop **recommendations** to address identified factors and possible additional efforts needed to support, develop, and diversify the industry

January 2024

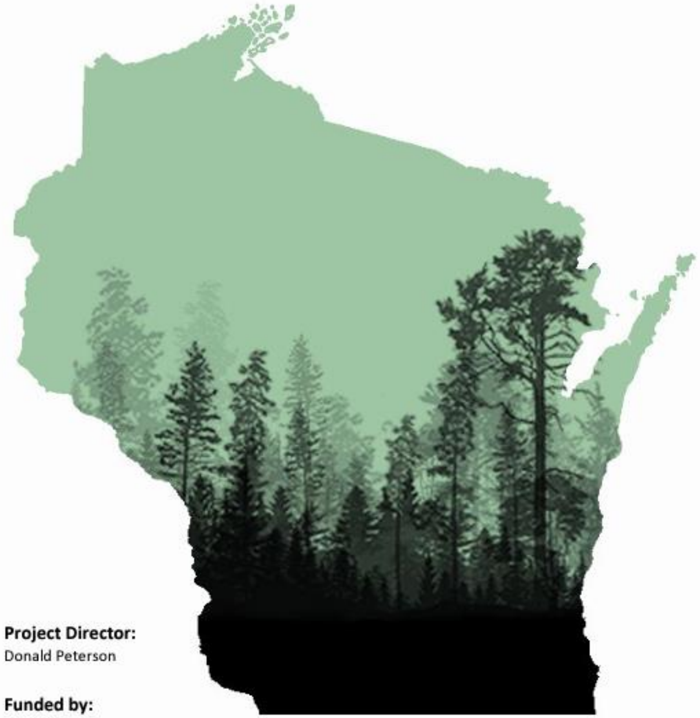
Wisconsin
Wood Supply Assessment

Center for Natural Resources Assessment & Decision Support
March 2016

VirginiaTech College of Natural Resources and Environment

Virginia Tech Center for Natural Resources Assessment and Decision Support

Pre-Feasibility Study for a Pulpwood-Using Facility Siting in the State of Wisconsin



Project Director:
Donald Peterson

Funded by:
State of Wisconsin
U.S. Forest Service Wood Innovations

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January 2024

2016

Wisconsin
Wood Supply Assessment

2020

Pre-Feasibility Study for a Pulpwood-Using Facility Siting in the State of Wisconsin

Summary

This forest resource assessment for Wisconsin was based on extensive analysis of spatial data and forest inventory data. Of Wisconsin's nonfederal forest land, 40% was in forest patches less than 20 acres in size which has implications for the commercial availability of much of the private forest land in the state. Only about 64% of nonfederal forest inventory was on sites similar enough to recent forest harvests to be considered available. While Wisconsin has surplus growth (on available land) of about 3.2 million tons annually, this surplus varies considerably by region and product class, with most surplus in the West Central region and almost exclusively in sawtimber-sized trees. This indicates very constrained conditions for industries relying on pulpwood-sized material in Wisconsin, a highly competitive environment that may be expected to lead to increases in wood cost in the pulpwood sector.

Results of this study indicate that there is expansion potential of both the pulp and the non-structural wood composite panel industries in Wisconsin. Wisconsin's thriving paper industry creates a strong pulp market. Wisconsin has been the leading manufacturer of paper in the U.S. for over 50 years and the state's paper products shipments were estimated at $13.8 billion in 2018. Currently, there is not enough pulp produced in the state to meet the demand of its paper mills, and Wisconsin's paper mills imported more than $401.6 million of wood pulp in 2018. In addition, Wisconsin has a strong value-added wood manufacturing industry, and many facilities use large volumes of non-structural wood composite panels in their products, most of which are imported from outside of the state.

The findings in this report should not be interpreted to imply that a mill should or will be expanded or built. This study presents considerations for Wisconsin communities, existing businesses, and entrepreneurs interested in developing new or expanded manufacturing capacity to utilize the pulpwood resource. Corporations that wish to develop or expand mills in Wisconsin can use this study to help them identify areas that best meet their needs, and communities can use the report to identify the types of mills that might be attracted to their area. Further feasibility assessment of siting manufacturing facilities at specific sites should be explored to maximize efficiencies. It is ultimately up to individual communities, their elected representatives, forest product businesses, and the public to work together to determine where development should occur.

MONEY

Verso to idle Wisconsin Rapids, Duluth mills indefinitely, starting at the end of July

Caitlin Shuda
Wisconsin Rapids Daily Tribune
Published 8:40 a.m. CT June 9, 2020 | Updated 3:31 p.m. CT June 9, 2020

Verso Mill in Wisconsin Rapids. File/Daily Tribune Media

RECOMMENDATIONS?
Not in the scope…

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Proposed Study Mechanics

- Acquire agreement with an entity that can act as the "client" to secure a consultant to conduct the study
- The Council would be the initial advocate for the study and funding via the WI legislature
- The Council would provide periodic review and input throughout the study process and be the "audience" for the study outcomes.
- The Council, following presentation of the final product, would provide a report to the appropriate legislative bodies containing the Council's recommendations to address the factors shown in the study preventing potential new and existing forest products companies from locating and expanding in WI, along with future needs to support, develop and diversify our forest products industry.

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Next Steps

- Council agreement needed to pivot to this new initiative focus
- Seek support and input from Council partners and others (?)
- Examine options for "steering committee" and secure willing study client and study cost estimate
- Council drafts a summary report on the overall initiative with a recommendation to proceed as described. Proposed audience is the Governor, legislative forestry committees, and DNR Secretary (CoF's "clients")
- Establish an initiative catchphrase *"Healthy Forests, Healthy (Robust, Diverse) Industry, Healthy (Strong, Thriving) Communities"*
- Possible Timing
  - Draft summary report and recommendation to proceed approved at March Council meeting (circulated to CoF members ahead of time)
  - Legislation to secure funding drafted summer 2024 for fall legislative session
  - Study completed by the late summer of 2025, final recommendations to legislators late fall 2025

January 2024