

# THE FOREST SECTOR SUPPLY CHAIN

## A STORY OF INTERDEPENDENT EFFICIENCY

*Our supply chain is built around the efficiency of using every part of a tree.  
The result is a forest products sector that is complex, interconnected, and interdependent.*



### FORESTS

Forest owners – together with foresters, government agencies, researchers, and other scientists – manage public and private forests to be productive, resilient, and healthy. Loggers and truckers move the logs from the forests to the mills, where we use every part of every log we harvest.

### LOGGERS

### FORESTERS & OTHER SCIENTISTS

### PRIVATE FOREST OWNERS

### LOCAL, TRIBAL, STATE, AND FEDERAL FOREST OWNERS

### FORESTS PRODUCTS MANUFACTURING

Mills produce lumber, veneer and engineered wood products, shakes and shingles, and post poles and pilings – the primary building materials for residential housing and building construction as well as infrastructure projects. The residuals are then used by pulp, paper, and wood products mills to make end-use consumer products. Those products in turn can be sustainably recycled and reused in other applications by converters.

### SAWMILLS

### PULP & PAPER MILLS

### ENGINEERED WOOD PRODUCTS MILLS

### CONVERTING FACILITIES

### RECYCLERS & HAULERS

### CUSTOMERS

Without the demand for lumber to drive timber harvests, pulp, paper and wood products manufacturers downstream don't have the raw material they need to make the tissue, paper, packaging, and recycled products we need to keep the economy moving. Americans depend on our customers to provide these products for everyday life.

### HOUSING & CONSTRUCTION

### RETAILERS & WHOLESALE

### DISTRIBUTORS

### PACKAGERS FOR FOOD, BEVERAGE, AND MEDICAL SUPPLIES

### PRINTERS

### TRANSPORTATION & INFRASTRUCTURE INDUSTRIES

### UTILITIES

### TRUCKERS



### SUPPORTING THE ENTIRE SUPPLY CHAIN:

**FORESTRY, LOGGING AND TRANSPORTATION, AND MILL EQUIPMENT MANUFACTURERS AND DISTRIBUTORS**

*No one element of the forest products supply chain can exist in isolation from the others.*

# IMPACT OF COVID-19 ON U.S. FORESTRY & FOREST PRODUCTS

As associations representing the U.S. forestry and forest products sector, we are proud to do our part to meet the needs of Americans throughout the COVID-19 pandemic and help drive our country's economic recovery. The men and women of the forest products industry have demonstrated a commitment to safely making the products Americans need every day but especially during the COVID-19 crisis. Thank you for supporting our country's working forests, pulp, paper and wood products manufacturers, renewable forest and wood products, American workers, and the rural communities that rely on a viable forest products industry.

## A CULTURE OF SAFETY

The forestry and forest products sector has a deeply-rooted culture of safety that affects everything we do. Rigorous safety procedures are a commonly held value embraced throughout the sector. Much of our work naturally occurs with little interpersonal interaction or is already set up to facilitate social distancing. Our enduring commitment to safety as a cultural norm has prepared us to adapt quickly and effectively to the new health and safety challenges presented by COVID-19.

## WE ARE ESSENTIAL

DHS has appropriately designated the entirety of our diverse supply chain as "essential business." We appreciate the efforts of Congress, the administration and state governments to recognize the critical nature of the forestry and forest products sector.



## READY TO SUPPORT OUR COUNTRY'S ECONOMIC RECOVERY

Our sector is a global leader in sustainable forestry practices, which is why our supply chain is built around efficiency to use every part of the trees we harvest. Together, the supply chain delivers in-demand tissue and pulp used in diapers and other personal hygiene products, packaging for consumer products including food and beverage, cleaning supplies, pharmaceuticals and medical products, and solid wood products used for residential construction, infrastructure maintenance and pallets for shipping.

The forestry and forest products sector in the United States **supports 2.9 million jobs, \$128 billion in payroll, and \$336 billion in sales and manufacturing.** Our complex and interconnected supply chain depends on thousands of small businesses, working families, and rural communities across the country. The breadth and impact of our sector is further amplified by our role as a foundational segment of the broader economy. Many other industries depend on the raw materials and products we produce.

The U.S. forestry and forest products sector can emerge from this crisis intact and well positioned to help drive our national economic recovery. To do that, we need policies that support every part of our sector including:

- Continued recognition of our entire **supply chain as essential infrastructure**
- Protecting and maintaining the ability of our **companies and workforce** to operate
- Allowing for the **transportation** of raw materials and finished products in an efficient manner
- Policies that ensure **strong markets for forest products**
- Measures that promote **consumer understanding** of the environmental benefits that working forests, wood and paper products provide

*Additional information, including specific policy priorities, has been provided by each principal organization within our supply chain.*

