



# GOVERNOR'S COUNCIL FOR WORKFORCE AND ECONOMIC DEVELOPMENT

EDUCATION

ECONOMIC DEVELOPMENT

EMPLOYMENT

STATE OF OKLAHOMA

## 2005 FORESTRY & LUMBER CLUSTER ANALYSIS

### DEFINITION OF INDUSTRY

The Forestry & Lumber Cluster is composed of those business establishments that directly engage in the growing, logging or processing of forestry products. There are thirty-six manufacturing industries in the Forestry & Lumber processing cluster and their operations include activities as varied as sawmills, paper mills, and furniture manufacturing.

### SIGNIFICANCE AND HIGHLIGHTS

Nationally in 2004, the Forestry & Lumber Cluster accounted for approximately 1.0% of total national employment. Comparably in Oklahoma, the Forestry & Lumber Cluster accounted for approximately 0.7% of the state's total employment. Since the proportion of total employment employed in the Cluster is greater in the nation than the state, Oklahoma's 2004 location quotient in this cluster is less than 1.0. However within selected counties, the proportion is greater in the county than the nation, and those counties have location quotients greater than 1.0.

Geographically, the Forestry & Lumber cluster is concentrated in the state's two largest metropolitan areas and in Eastern Oklahoma. The top five counties employ 6,772 people, or 72.1% of the total cluster employment. Other than Oklahoma county, the remaining top employing counties are located in Eastern Oklahoma.

### DATA SOURCES

Data used for this analysis was obtained from the Oklahoma Employment Security Commission and included filings of Oklahoma employers as of March 2004.

### CLUSTER STATISTICS

Employer Units	409
Number of Employees	9,395
Percent of Total Oklahoma Employment	0.7%
Net Employment Change between 2002 and 2004	+273
Average Annual Wages	\$35,470
Location Quotient	0.64
Change in Location Quotient 2002-2004	+24.0%

## TOP FIVE INDUSTRIES IN THE FORESTRY & LUMBER CLUSTER

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The top five industries employ 5,148 (or 54.8%) of a total of 9,395 in the entire cluster.

NAICS	Industry	Employment	Percent of Cluster
322291	Sanitary Paper Product Manufacturing	(D)	(D)
321113	Sawmills	1,194	12.7%
337110	Wood Kitchen Cabinet & Countertop Manufacturing	1,035	11.0%
321991	Manufactured Home Manufacturing	886	9.4%
322121	Paper (except Newsprint) Mills	783	8.3%

(D) = Data suppressed for disclosure reasons.

## TOP EMPLOYERS IN THE FORESTRY & LUMBER CLUSTER

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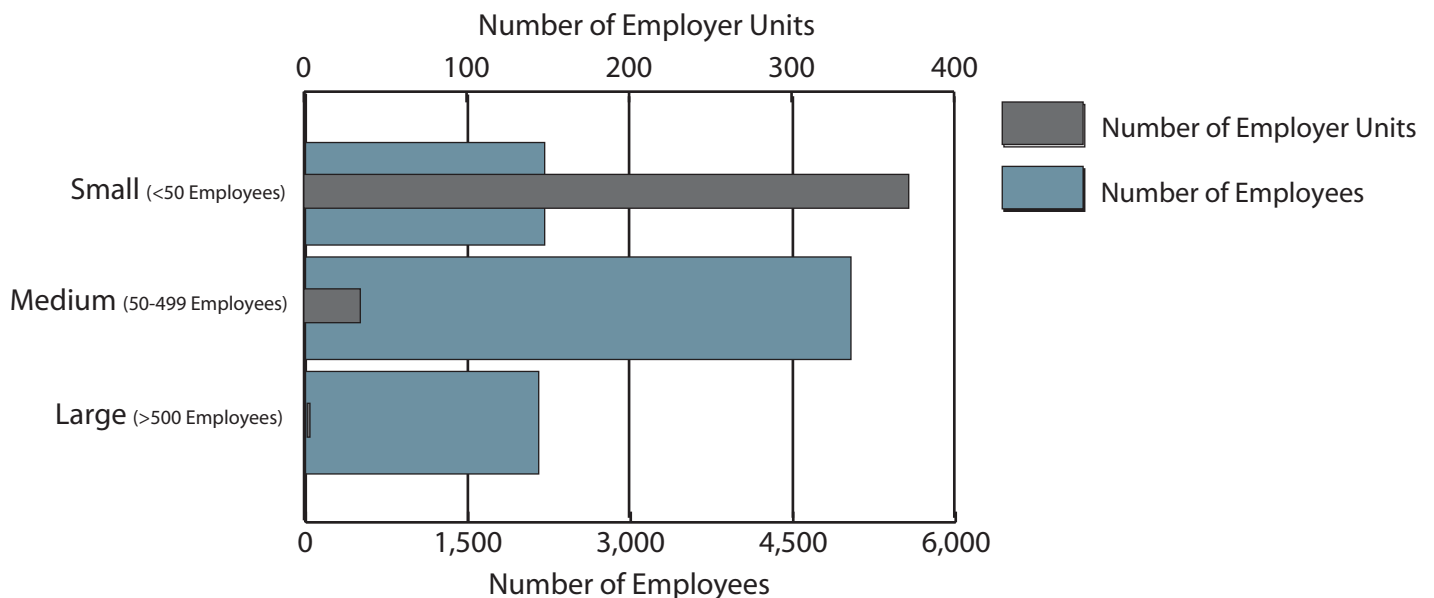
Company Name	Employee Range
Georgia-Pacific, Inc.	1,000 - 2,000
Weyerhaeuser Company	500 - 1,000
Solitare Holdings, LLC	<500
Kimberly-Clark Corporation	<500
Love Box Company, Inc.	<500

## INDUSTRY LOCATION QUOTIENTS

NAICS	Industry	Location Quotient	2002-2004 LQ % Change
322291	Sanitary Paper Product Manufacturing	3.61	12.1%
321991	Manufactured Home (Mobile Home) Manufacturing	2.05	67.8%
321113	Sawmills	1.13	-0.3%
321114	Wood Preservation	0.93	-26.5%
321219	Reconstituted Wood Product Manufacturing	0.86	28.4%

## DISTRIBUTION OF EMPLOYER UNITS & JOBS BY EMPLOYER SIZE (MARCH 2004)

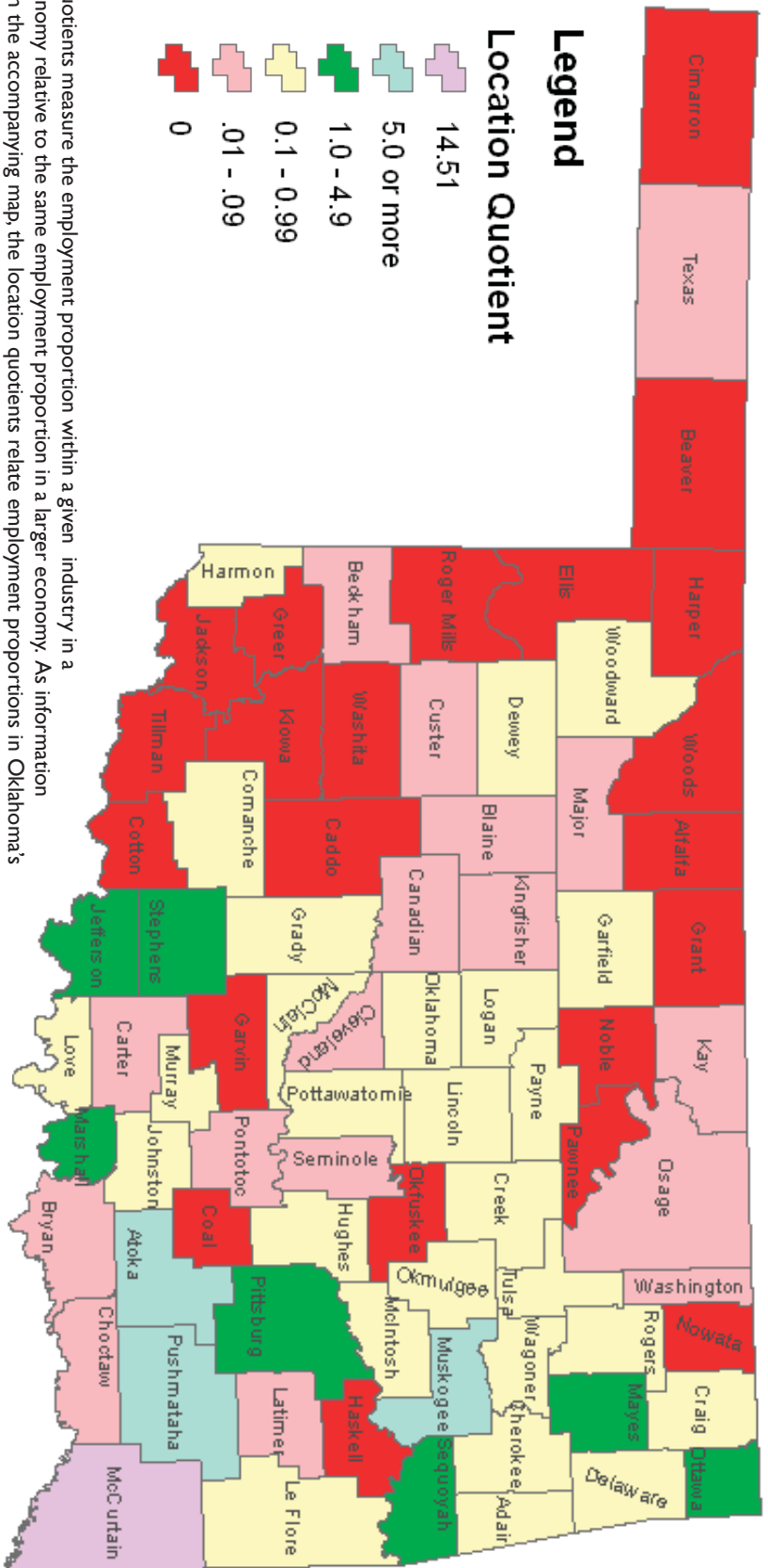
Range	Employer Units	Employees
Small (<50 employees)	372	2,209
Medium (50-500 employees)	35	5,032
Large (>500 employees)	2	2,154







**FORESTRY & LUMBER CLUSTER COUNTY LOCATION QUOTIENTS**



Location quotients measure the employment proportion within a given industry in a smaller economy relative to the same employment proportion in a larger economy. As information contained in the accompanying map, the location quotients relate employment proportions in Oklahoma's county economies to the same employment proportion in the state economy. As information contained in the "Industry Location Quotients" table, total Oklahoma Industry employment information was compared to total national industry employment data.

Location quotients greater than 1.0 indicate that employment in a given industry is more concentrated in the county economy when compared to the state economy. Conversely, location quotients less than 1.0 indicate that industry employment is less concentrated in the county economy when compared to the state economy. Location quotients equal to 1.0 indicate that the employment proportions within a given industry are equal in the county and the state economies.

Example:  
 In the Forestry & Lumber cluster, Oklahoma County's location quotient equals 0.44. This indicates that the proportion of people employed in the Forestry & Lumber cluster in Oklahoma county is 44% of the Forestry & Lumber employment proportion in the state as a whole. Conversely, McCurtain County's location quotient equals 14.51 which indicates that the proportion of people employed in the Forestry & Lumber cluster in McCurtain County is 1451% of the Forestry & Lumber employment proportion in the state as a whole.

From the "Industry Location Quotients" table, the location quotient for the Sanitary Paper Product Manufacturing (NAICS 322291) equaled 3.61, which indicates that the proportion of people employed in this industry in Oklahoma is 361% of the same national proportion.

The most current national data available to compute location quotients is from the U.S. Bureau of Labor Statistics for 2004.

**FORESTRY & LUMBER CLUSTER COUNTY STATE LOCATIONS**



## FORESTRY & LUMBER INDUSTRIES

### 113110 **TIMBER TRACT OPERATIONS**

THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN THE OPERATION OF TIMBER TRACTS FOR THE PURPOSE OF SELLING STANDING TIMBER.

### 113210 **FOREST NURSERIES AND GATHERING OF FOREST PRODUCTS**

THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN (1) GROWING TREES FOR REFORESTATION AND/OR (2) GATHERING FOREST PRODUCTS, SUCH AS GUMS, BARKS, BALSAM NEEDLES, RHIZOMES, FIBERS, PANISH MOSS, GINSENG, AND TRUFFLES.

### 113310 **LOGGING**

THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN ONE OR MORE OF THE FOLLOWING: (1) CUTTING TIMBER; (2) CUTTING AND TRANSPORTING TIMBER; AND (3) PRODUCING WOOD CHIPS IN THE FIELD.

### 321113 **SAWMILLS**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN SAWING DIMENSION LUMBER, BOARDS, BEAMS, TIMBERS, POLES, TIES, SHINGLES, SHAKES, SIDING, AND WOOD CHIPS FROM LOGS OR BOLTS. SAWMILLS MAY PLANE THE ROUGH LUMBER THAT THEY MAKE WITH A PLANING MACHINE TO ACHIEVE SMOOTHNESS AND UNIFORMITY OF SIZE.

### 321114 **WOOD PRESERVATION**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN (1) TREATING WOOD SAWED, PLANED, OR SHAPED IN OTHER ESTABLISHMENTS WITH CREOSOTE OR OTHER PRESERVATIVES, SUCH AS CHROMATED COPPER ARSENATE, TO PREVENT DECAY AND TO PROTECT AGAINST FIRE AND INSECTS AND/OR (2) SAWING ROUND WOOD POLES, PILINGS, AND POSTS AND TREATING THEM WITH PRESERVATIVES.

### 321211 **HARDWOOD VENEER AND PLYWOOD MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING HARDWOOD VENEER AND/OR HARDWOOD PLYWOOD.

### 321212 **SOFTWOOD VENEER AND PLYWOOD MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING SOFTWOOD VENEER AND/OR SOFTWOOD PLYWOOD.

### 321213 **ENGINEERED WOOD MEMBER (EXCEPT TRUSS) MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING FABRICATED OR LAMINATED WOOD ARCHES AND/OR OTHER FABRICATED OR LAMINATED WOOD STRUCTURAL MEMBERS.

### 321214 **TRUSS MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING LAMINATED OR FABRICATED WOOD ROOF AND FLOOR TRUSSES.

### 321219 **RECONSTITUTED WOOD PRODUCT MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING RECONSTITUTED WOOD SHEETS AND BOARDS.

### 321911 **WOOD WINDOW AND DOOR MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING WINDOW AND DOOR UNITS, SASH, WINDOW AND DOOR FRAMES, AND DOORS FROM WOOD OR WOOD CLAD WITH METAL OR PLASTICS.

### 321912 **CUT STOCK, RESAWING LUMBER, AND PLANING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN ONE OR MORE OF THE FOLLOWING: (1) MANUFACTURING DIMENSION LUMBER FROM PURCHASED LUMBER; (2) MANUFACTURING DIMENSION STOCK (I.E., SHAPES) OR CUT STOCK; (3) RESAWING THE OUTPUT OF SAWMILLS; AND (4) PLANING PURCHASED LUMBER. THESE ESTABLISHMENTS GENERALLY USE WOODWORKING MACHINERY, SUCH AS JOINTERS, PLANERS, LATHES, AND ROUTERS TO SHAPE WOOD.

### 321918 **OTHER MILLWORK (INCLUDING FLOORING)**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING MILLWORK (EXCEPT WOOD WINDOWS, WOOD DOORS, AND CUT STOCK).

### 321920 **WOOD CONTAINER AND PALLET MANUFACTURING**

THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING WOOD PALLETS, WOOD BOX SHOOK, WOOD BOXES, OTHER WOOD CONTAINERS, AND WOOD PARTS FOR PALLETS AND CONTAINERS.



## FORESTRY & LUMBER INDUSTRIES

### 321991 **MANUFACTURED HOME (MOBILE HOME) MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MAKING MANUFACTURED HOMES (I.E., MOBILE HOMES) AND NONRESIDENTIAL MOBILE BUILDINGS. MANUFACTURED HOMES ARE DESIGNED TO ACCEPT PERMANENT WATER, SEWER, AND UTILITY CONNECTIONS AND ALTHOUGH EQUIPPED WITH WHEELS, THEY ARE NOT INTENDED FOR REGULAR HIGHWAY MOVEMENT.

### 321992 **PREFABRICATED WOOD BUILDING MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING PREFABRICATED WOOD BUILDINGS AND WOOD SECTIONS AND PANELS FOR PREFABRICATED WOOD BUILDINGS.

### 321999 **ALL OTHER MISCELLANEOUS WOOD PRODUCT MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING WOOD PRODUCTS (EXCEPT ESTABLISHMENTS OPERATING SAWMILLS AND PRESERVATION FACILITIES; ESTABLISHMENTS MANUFACTURING VENEER, ENGINEERED WOOD PRODUCTS, MILLWORK, WOOD CONTAINERS, PALLETS, AND WOOD CONTAINER PARTS; AND ESTABLISHMENTS MAKING MANUFACTURED HOMES (I.E., MOBILE HOMES) AND PREFABRICATED BUILDINGS AND COMPONENTS).

### 322110 **PULP MILLS**

THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING PULP WITHOUT MANUFACTURING PAPER OR PAPERBOARD. THE PULP IS MADE BY SEPARATING THE CELLULOSE FIBERS FROM THE OTHER IMPURITIES IN WOOD OR OTHER MATERIALS, SUCH AS USED OR RECYCLED RAGS, LINTERS, SCRAP PAPER, AND STRAW.

### 322121 **PAPER (EXCEPT NEWSPRINT) MILLS**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING PAPER (EXCEPT NEWSPRINT AND UNCOATED GROUNDWOOD PAPER) FROM PULP. THESE ESTABLISHMENTS MAY MANUFACTURE OR PURCHASE PULP. IN ADDITION, THE ESTABLISHMENTS MAY ALSO CONVERT THE PAPER THEY MAKE.

### 322130 **PAPERBOARD MILLS**

THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING PAPERBOARD FROM PULP. THESE ESTABLISHMENTS MAY MANUFACTURE OR PURCHASE PULP. IN ADDITION, THE ESTABLISHMENTS MAY ALSO CONVERT THE PAPERBOARD THEY MAKE.

### 322211 **CORRUGATED AND SOLID FIBER BOX MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN LAMINATING PURCHASED PAPER OR PAPERBOARD INTO CORRUGATED OR SOLID FIBER BOXES AND RELATED PRODUCTS, SUCH AS PADS, PARTITIONS, PALLETS, AND CORRUGATED PAPER WITHOUT MANUFACTURING PAPERBOARD. THESE BOXES ARE GENERALLY USED FOR SHIPPING.

### 322212 **FOLDING PAPERBOARD BOX MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN CONVERTING PAPERBOARD (EXCEPT CORRUGATED) INTO FOLDING PAPERBOARD BOXES WITHOUT MANUFACTURING PAPER AND PAPERBOARD.

### 322213 **SETUP PAPERBOARD BOX MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN CONVERTING PAPERBOARD INTO SETUP PAPERBOARD BOXES (I.E., RIGID-SIDED BOXES NOT SHIPPED FLAT) WITHOUT MANUFACTURING PAPERBOARD.

### 322214 **FIBER CAN, TUBE, DRUM, AND SIMILAR PRODUCTS MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN CONVERTING PAPERBOARD INTO FIBER CANS, TUBES, DRUMS, AND SIMILAR PRODUCTS WITHOUT MANUFACTURING PAPERBOARD.

### 322215 **NONFOLDING SANITARY FOOD CONTAINER MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN CONVERTING SANITARY FOODBOARD INTO FOOD CONTAINERS (EXCEPT FOLDING).

### 322221 **COATED AND LAMINATED PACKAGING PAPER AND PLASTICS FILM MFTG.**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN PERFORMING ONE OR MORE OF THE FOLLOWING ACTIVITIES ASSOCIATED WITH THE MANUFACTURING OF PACKAGING MATERIALS: (1) CUTTING AND COATING PAPER; AND (2) CUTTING AND LAMINATING PAPER WITH OTHER FLEXIBLE MATERIALS (EXCEPT PLASTICS TO PLASTICS OR FOIL TO PAPER LAMINATES). THE PRODUCTS MADE IN THIS INDUSTRY ARE MADE FROM PURCHASED SHEET MATERIALS AND MAY BE PRINTED IN THE SAME ESTABLISHMENT.

**FORESTRY & LUMBER INDUSTRIES****322222 COATED AND LAMINATED PAPER MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN PERFORMING ONE OR MORE OF THE FOLLOWING ACTIVITIES ASSOCIATED WITH MAKING PRODUCTS DESIGNED FOR PURPOSES OTHER THAN PACKAGING: (1) CUTTING AND COATING PAPER; (2) CUTTING AND LAMINATING PAPER AND OTHER FLEXIBLE MATERIALS (EXCEPT PLASTICS FILM TO PLASTICS FILM); AND (3) LAMINATING ALUMINUM AND OTHER METAL FOILS FOR NONPACKAGING USES FROM PURCHASED FOILS. THE PRODUCTS MADE IN THIS INDUSTRY ARE MADE FROM PURCHASED SHEET MATERIALS AND MAY BE PRINTED IN THE SAME ESTABLISHMENT.

**322224 UNCOATED PAPER AND MULTIWALL BAG MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING UNCOATED PAPER BAGS OR MULTIWALL BAGS AND SACKS.

**322231 DIE-CUT PAPER AND PAPERBOARD OFFICE SUPPLIES MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN CONVERTING PAPER ROLL STOCK OR PAPER BOARD INTO DIE-CUT PAPER OR PAPERBOARD OFFICE SUPPLIES. FOR THE PURPOSE OF THIS INDUSTRY, OFFICE SUPPLIES ARE DEFINED AS OFFICE PRODUCTS, SUCH AS FILING FOLDERS, INDEX CARDS, ROLLS FOR ADDING MACHINES, FILE SEPARATORS AND DIVIDERS, TABULATING CARDS, AND OTHER PAPER AND PAPERBOARD OFFICE SUPPLIES.

**322232 ENVELOPE MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING ENVELOPES FOR MAILING OR STATIONERY OF ANY MATERIAL INCLUDING COMBINATIONS.

**322232 STATIONERY, TABLET, AND RELATED PRODUCT MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN CONVERTING PAPER AND PAPERBOARD INTO PRODUCTS USED FOR WRITING AND SIMILAR APPLICATIONS (E.G., LOOSELEAF FILLERS, NOTEBOOKS, PADS, STATIONERY, TABLETS).

**322291 SANITARY PAPER PRODUCT MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN CONVERTING PURCHASED SANITARY PAPER STOCK OR WADDING INTO SANITARY PAPER PRODUCTS, SUCH AS FACIAL TISSUES AND HANDKERCHIEFS, TABLE NAPKINS, TOILET PAPER, TOWELS, DISPOSABLE DIAPERS, SANITARY NAPKINS, AND TAMPONS.

**322299 ALL OTHER CONVERTED PAPER PRODUCT MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN CONVERTING PAPER OR PAPERBOARD INTO PRODUCTS (EXCEPT CONTAINERS, BAGS, COATED AND TREATED PAPER, STATIONERY PRODUCTS, AND SANITARY PAPER PRODUCTS) OR CONVERTING PULP INTO PULP PRODUCTS, SUCH AS EGG CARTONS, FOOD TRAYS, AND OTHER FOOD CONTAINERS FROM MOLDED PULP.

**333210 SAWMILL AND WOODWORKING MACHINERY MANUFACTURING**

THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING SAWMILL AND WOODWORKING MACHINERY (EXCEPT HANDHELD), SUCH AS CIRCULAR AND BAND SAWING EQUIPMENT, PLANING MACHINERY, AND SANDING MACHINERY.

**333291 PAPER INDUSTRY MACHINERY MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING PAPER INDUSTRY MACHINERY FOR MAKING PAPER AND PAPER PRODUCTS, SUCH AS PULP MAKING MACHINERY, PAPER AND PAPERBOARD MAKING MACHINERY, AND PAPER AND PAPERBOARD CONVERTING MACHINERY.

**333293 PRINTING MACHINERY AND EQUIPMENT MANUFACTURING**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING PRINTING AND BOOKBINDING MACHINERY AND EQUIPMENT, SUCH AS PRINTING PRESSES, TYPESETTING MACHINERY, AND BINDERY MACHINERY.

**FORESTRY & LUMBER INDUSTRIES**

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**337110 Wood Kitchen Cabinet and Countertop Manufacturing**

THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING WOOD OR PLASTICS LAMINATED ON WOOD KITCHEN CABINETS, BATHROOM VANITIES, AND COUNTERTOPS (EXCEPT FREESTANDING). THE CABINETS AND COUNTERS MAY BE MADE ON A STOCK OR CUSTOM BASIS.

**337121 Upholstered Household Furniture Manufacturing**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING UPHOLSTERED HOUSEHOLD-TYPE FURNITURE. THE FURNITURE MAY BE MADE ON A STOCK OR CUSTOM BASIS.

**337122 Nonupholstered Wood Household Furniture Manufacturing**

THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN MANUFACTURING NONUPHOLSTERED WOOD HOUSEHOLD-TYPE FURNITURE AND FREESTANDING CABINETS (EXCEPT TELEVISION, RADIO, AND SEWING MACHINE CABINETS). THE FURNITURE MAY BE MADE ON A STOCK OR CUSTOM BASIS AND MAY BE ASSEMBLED OR UNASSEMBLED (I.E., KNOCKDOWN).