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## Final Report: Georgia Timber Products Output Survey, 2015

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### Executive Summary

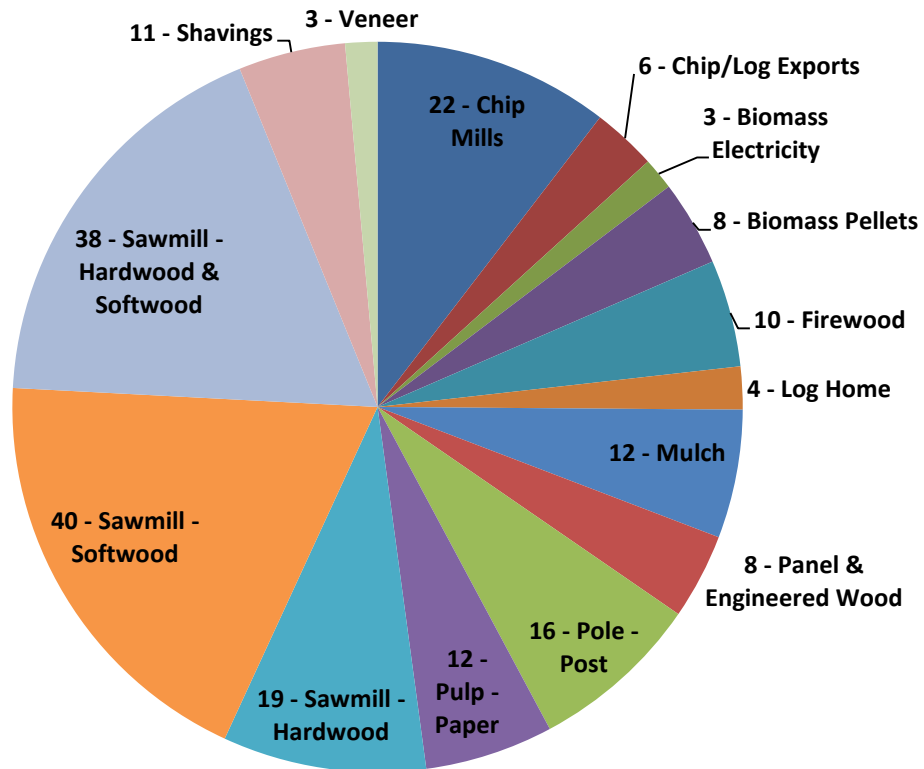
In cooperation with the USDA Forest Service Southern Research Station (USFS-SRS), Georgia Forestry Commission (GFC) Forest Utilization personnel Jonathan Brown, Bill Pryor, Dru Preston & Risher Willard recently completed the 2015 Georgia Timber Product Output (TPO) survey. GFC partners with SRS by providing personnel to coordinate and conduct the voluntary, bi-annual surveys. All primary wood-using industries in Georgia were surveyed between February and October, 2016. Primary wood-using industries are defined as mills that convert round-wood products (saw logs, veneer logs, pulpwood, etc.) into primary wood products, such as lumber, veneer, OSB, poles, wood pulp and wood pellets etc. Data collected was for calendar year 2015.

Each mill was asked to report on log receipts, volume of products produced, log receipts by species and county of origin and the disposal of mill residues. GFC personnel promptly submitted each survey to the Southern Research Station for statistical analyses. Results from this survey will be published in a subsequent USDA Forest Service SRS resource bulletin; however, individual mill data is confidential and no individual mill information will be evident in the report since the data is aggregated by county and region.

Around 160 mills were surveyed, with more potential mills contacted. Many of these potential mills were discovered to be secondary or part time and were not included with the primary survey. Of the roughly 160 mills, around 92% cooperated fully, 3% partially (provided contact information or partial numbers) and 5% refused and/or no information was received. GFC personnel do not survey pulp and paper or chip mills as these are surveyed directly by the USFS SRS. This is a lower participation rate than in previous years and continues a decline in participation that seemed to begin with the 2013 TPO survey. **All totaled there are 190**

primary wood-using mills operating in Georgia, with some of these mills having more than one primary product output for a total of 212 product types. *See Chart 1.*

**Chart 1. 2016 Georgia Primary Wood-using Mills by Total Product Types**



\*Note: The numbers on this chart add up to more than 190 as some mills have multiple product outputs.

There is a net gain of (7) mills over the previous survey of 2013. The biggest gains by mill type are Sawmill – Hardwood and Chip/Log Exporters. For the largest of the net losses, biomass pellets had two mills go into idle/status unknown. *See Table 1.*

## Table 1. Georgia's Primary Wood-using Industries - 2015

\*In this table, the assignment by mill type is based on the main primary output/business type for each mill - note: some mills have more than one output or business type

Mill Type	Gain				Loss				2013 Mill Total	2015 Mill Total	Net Change
	New	Added Output Type	Re-opened	Secondary to Primary	Closed	Dropped Output	Idle	Primary to Secondary			
Chip Mill	1				1	1			19	18	1
Chip/Log Exporter	4						1		2	5	3
Biomass Electricity									3	3	
Biomass Pellets							2		7	5	2
Firewood	1					1		1	9	8	1
Log Home		1		1					2	3	2
Mulch	2								5	7	2
Panel & Engineered Wood									6	6	
Pole									8	8	
Post									5	5	
Pulp-Paper									12	12	
Sawmill - HWD	4						1		16	19	3
Sawmill - SFTWD								1	41	40	1
Sawmill - HWD & SFTWD	4				2			1	37	38	1
Shavings	1	1							9	10	1
Veneer									3	3	
									<b>183</b>	<b>190</b>	<b>7</b>

## **Mill Notes and Changes Since 2013 Survey**

### **Sawmill Notes:**

#### **New and/or Newly Discovered:**

Blue Ridge Pallet (hardwood), Fannin County – operating since 1980's

Brooks Pallet Company (hardwood & softwood), Carroll County – operating for a few years and plans on moving location to Haralson County

Circle H Sawmill & Farming (hardwood & softwood), Walker County – began in 2015 and plans on adding a dry kiln

Georgia Cross Ties LLC (hardwood), Jasper County – began in 2016 at old Georgia Pine Shavings site

Mountain Oak Mill (hardwood), Harris County – operating for a few years

Muchocho's Sawmill & Pallets (hardwood & softwood), Lowndes County – began operating at end of 2015

Robinson Stave LLC (hardwood), Fannin County – began operating in 2016 and focuses on stave barrel market

Young's Pulpwood & Grading (hardwood & softwood), Cherokee County – operating since 2012 in current location

#### **Closed:**

Mount Yonah Lumber Company (hardwood & softwood), White County – went out of business in early, 2016 – mill is dismantled and equipment has been removed

Sowega Lumber Company (hardwood & softwood), Grady County – closed at end of 2014 – mill is dismantled and equipment has been removed

#### **Idle and/or Secondary:**

Diamond G Lumber Company (softwood), Pierce County – sawmill is idle and facility has converted to naval stores distillery – secondary mill

Irvin Lumber Company (hardwood & softwood), White County – discovered during survey that this mill is actually a secondary mill

Legacy Lumber (hardwood), Gordon County – mill appears to be idle, could not contact owner

## **Sawmill Notes:**

### Other Sawmill Notes:

151 Sawmill (hardwood & softwood), Walker County - new name – changed from Chapman Sawmill and new ownership

Atlantic Fine Wood (hardwood), DeKalb County – new name – changed from African Figured Wood and is moving to a new location in DeKalb County

Canfor – Moultrie (softwood), Colquitt County – name changed from Beadles Lumber Company

Canfor – Thomasville (softwood), Thomas County – name changed from Balfour Lumber Company

Hogan Lumber Company – (softwood), White County – added a shavings operation

Langdale Forest Products – (softwood), Lowndes County – added machine stress rated lumber

OAR Recycling – Henry County – dropped sawmill – still an active mulch and firewood operation

Sims Forest Products (hardwood) – currently uses hardwood only – last survey used hardwood and pine

South Paulding Lumber Company (hardwood & softwood), Paulding County - listed in 2013 survey as recently closed, confirmed in 2015 survey that they are closed permanently

THL Pallets (hardwood & softwood), Screven County – name changed from Row Matting and new ownership

Walker, Sidney Enterprises (hardwood & softwood), Wilkes County – listed in 2013 survey as idle - confirmed in 2015 survey that they are closed

## **Chip Mill Notes:**

### New/Newly Discovered:

International Paper (hardwood & softwood), Effingham County – in operation since 2005

## **Chip Mill Notes:**

### Closed/Idle:

Industrial Marine Services (softwood), Screven County – satellite chip mill for Peeples Industries – closed and has been dismantled. In operation approximately one year

Pulliam Lumber Company (Post Mill – softwood), Glascock County – dropped their stationary chip mill operation

## **Chip/Log Exporter Notes:**

### New/Newly Discovered:

East Coast Terminals (SYP – chips & logs), Chatham County – subsidiary of Peeples Industries and been in business for decades

Gann Inc. (SYP – logs), Bryan County – originally began in Effingham County and that site closed. Currently operating at Bryan County site

KinKen Transport LLC (SYP – logs), McIntosh County – in operation since 2014

Metro Ports (SYP – logs), Chatham County – active, but no further information

### Closed/Idle:

S. A. Allen Inc. (SYP – chips) Chatham County – currently chip exporting part of business is idle

## **Biomass Pellets Notes:**

Blue Sky Biomass of Georgia – Cook County – Listed as starting in early 2016 – current status uncertain. Located at old Sierra Pine particleboard site – company bought facility but has not started up

SAID, Inc. – Screven County – new name – formerly known as Briar Creek Pellets

SEGA Biofuels – Brantley County – status Idle/uncertain. Currently unknown whether facility will come back on line

## **Firewood Notes:**

### New/Newly Discovered:

Red Oak Firewood – Carroll County – in operation a few years

**Firewood Notes:**Secondary/Other:

Georgia Landscape Supply – Cobb County – Discovered during survey that this is actually a secondary mill

Champion Lumber Company (sawmill – softwood), Jasper County – no longer produces firewood

**Log Home Notes:**

Mulch MFG (sawmill – softwood), Clinch County – added log home manufacturing in addition to their sawmill operation

Quality Log Homes – Lowndes County – listed previously as a secondary discovered during survey that they have actually taken round-wood since around 2010

Southern Log Wholesalers – Walker County – listed previously as idle, confirmed in survey that they are closed permanently

**Mulch Notes:**New/Newly Discovered:

Carden Timber Harvesting – Spalding County – in operation since 2013, also firewood operation

Hood Timber and Landscaping Products – Lowndes County – started operations at this facility in 2015 – owned/subsidiary of Hood Timber Company in Adel - Cook County

Other:

Green Thumb of Georgia – Pierce County – listed as idle in 2013 survey – confirmed that status remains idle and uncertain in 2015 survey

**Pole Mill Notes:**

Ace Pole Company – Pierce County – began exporting logs through a third party since last survey

Balfour Pole Company – Mitchell County – began exporting poles since last survey

### **Shavings Mill Notes:**

MD Turner Enterprise – Dawson County – Originally established in 2007, recently under new ownership and name changed to current from Coal Mountain Shavings. Also a hardwood log dealer

### **Veneer Mill Notes:**

Elberta Box & Crate – Decatur County – began exporting since last survey

### **Mills with Multiple Product Outputs**

Of the 190 separate mills in the state, (22) have two main product outputs and are listed as follows:

Battle Lumber Company	sawmill – hardwood & stationary chip mill	Jefferson County
Beach Timber Company	pole & mulch	Bacon County
Beasley Forest Products	sawmill – hardwood & stationary chip mill	Jeff Davis County
Carden Timber Harvesting	mulch & firewood	Spalding County
Dupont Yard	sawmill – softwood & post	Clinch County
East Coast Terminals	chip export & log export	Chatham County
Guthrie Lumber Company	sawmill – softwood & mulch	Cook County
Langdale Forest Products	sawmill – softwood & pole	Lowndes County
Hogan Lumber Company	sawmill – softwood & shavings	White County
Mulch MFG	sawmill – softwood & post	Clinch County
Nature’s Choice	firewood & mulch	Tattnall County
New Urban Forestry	sawmill – hardwood & softwood & mulch	Clarke County
OAR Recycling	mulch & firewood	Henry County
Shearouse Lumber Company	sawmill – hardwood & softwood & pole	Chatham County
Sims Forest Products	sawmill – hardwood & mulch	Meriwether County
Smith, J. P. Lumber Company	sawmill – hardwood & wood pellets	Chattooga County
Southern Veneer Products	veneer & panel (plywood)	Ben Hill County
Sutton Lumber Company	sawmill – hardwood & softwood & chip mill	Murray County
Telfair Forest Products	shavings & wood pellets	Telfair County
Thompson Hardwoods	sawmill – hardwood & stationary chip mill	Jeff Davis County
Truax Veneer Company	veneer & panel (plywood)	Toombs County
Varn Wood Products	sawmill – softwood & wood pellets	Brantley County



## Mills by Location

Mills by GFC District location and mill type are shown in *Table 2*. Some highlights are as follows:

- 20 out of 38 or 53% of sawmill - hwd & sftwd are located in the Coosa District – North Georgia.
- 12 out of 19 or 63% of sawmill – hwd are located in the Chattahoochee and Oconee Districts – middle Georgia and Piedmont.
- 29 out of 40 or 73% of sawmill – sftwd are located in Ogeechee, Satilla & Flint Districts – lower middle Georgia (Fall Line) and South Georgia.
- 8 out of 8 or 100% of Pole mills and 8 out of 12 or 66% of Pulp mills are located in Ogeechee, Satilla & Flint Districts.
- 4 out of 5 or 80% of dedicated pellet mills (also 2 other pellet mills that produce an additional primary product) are located in Ogeechee & Satilla Districts – near the ports.

<b>Table 2. 2015 Georgia Primary Wood-using Mills by Primary Product &amp; Mill Type and Georgia Forestry Commission District</b>							
Mill Type	Coosa	Chatta - hoochee	Oconee	Ogeechee	Satilla	Flint	Total
Chip Mill	2	2	4	4	3	3	<b>18</b>
Chip/Log Exporter	0	0	0	5	0	0	<b>5</b>
Biomass Electricity	1	1	0	1	0	0	<b>3</b>
Biomass Pellets	0	1	0	1	3	0	<b>5</b>
Firewood	2	3	0	1	0	2	<b>8</b>
Log Home	1	0	1	0	1	0	<b>3</b>
Mulch	0	2	1	0	3	1	<b>7</b>
Panel & Engineered Wood	2	1	0	0	1	2	<b>6</b>
Pole	0	0	0	3	2	3	<b>8</b>
Post	1	0	1	1	2	0	<b>5</b>
Pulp-Paper	1	0	3	3	3	2	<b>12</b>
Sawmill - HWD	3	6	6	0	2	2	<b>19</b>

Sawmill - SFTWD	3	2	6	8	11	10	<b>40</b>
Sawmill - HWD & SFTWD	20	3	3	6	1	5	<b>38</b>
Shavings	4	0	3	2	0	1	<b>10</b>
Veneer	0	0	0	1	0	2	<b>3</b>
<b>Totals</b>	<b>40</b>	<b>21</b>	<b>28</b>	<b>36</b>	<b>32</b>	<b>33</b>	<b>190</b>

Georgia has 159 counties and 95 of these counties or 60% have at least one primary mill, the following eight counties contain (4) or more primary mills:

<u>County</u>	<u># Mills</u>	<u>GFC District</u>
Lowndes	6	Satilla
Ben Hill	5	Flint
Chatham	5	Ogeechee
Effingham	5	Ogeechee
Screven	5	Ogeechee
Clinch	4	Satilla
Carroll	4	Chattahoochee
Wilkes	4	Oconee

### **Exporting Mills**

When considering the 212 total output types by the 190 separate mills, 67 or 32% are exported overseas. A few highlights are as follows:

- All of the pulp and paper mills export either directly or through their corporate marketing divisions.
- Six of the eight operating pellet mills export and the other two serve the domestic market.
- 26 of 97 sawmills export and four of eight pole mills export

*See Table 3 & Chart2.*

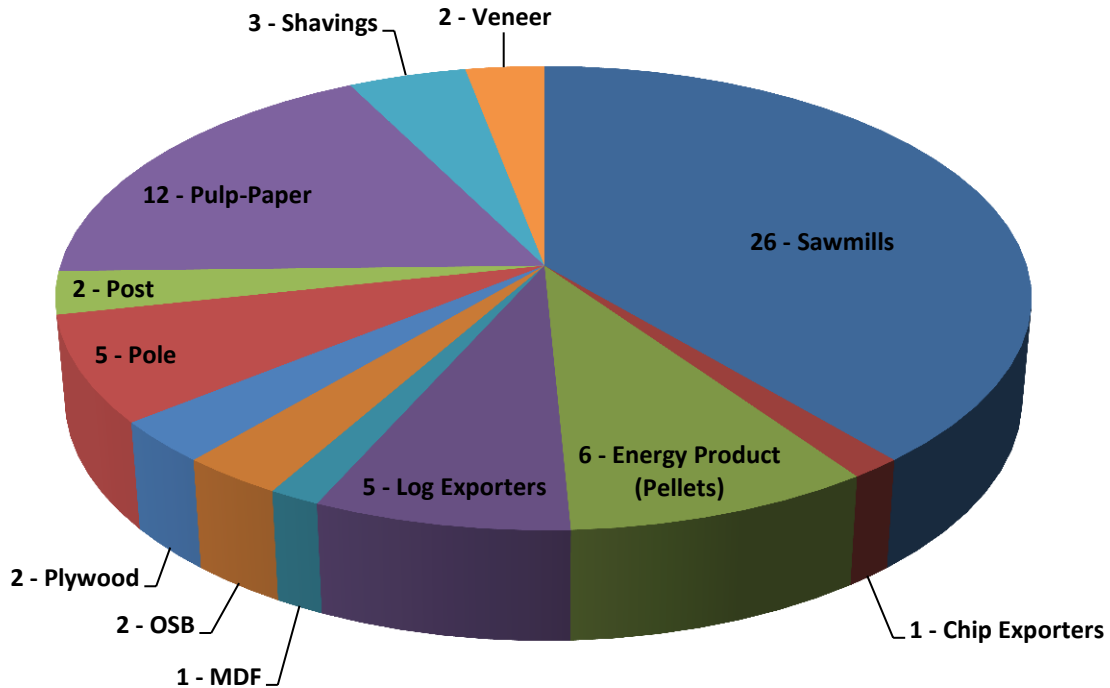
**Table 3. Total Mill Types and Number of Mills that Export**

Mill Type	Mills by Type	Exporting Mills
Sawmill	97	26
Chip Mills	22	0
Chip Exporters	1	1
Energy Product	11	6
Firewood	10	0
Log Exporters	5	5
Log Home	4	0
MDF	1	1
Mulch	12	0
OSB	3	2
Plywood	4	2
Pole	10	5
Post	6	2
Pulp-Paper	12	12
Shavings	11	3
Veneer	3	2
Total	212	67
% of Total		32%

When considering the mills by percentage that export:

- 100% Export: pulp & paper, MDF, log exporters, chip exporters
- 66%: OSB & veneer
- 50% to 55%: plywood, pole & energy products (pellets)
- 30% to a 33%: post & shavings
- All firewood, mulch, log home & chip mills produce products for the domestic market

**Chart 2. 2016 Exporters by Mill Type**



**Mill Equipment & Products**

Some of the highlights of products produced are:

- 38 of 97 sawmills or 39% produce dressed/planed lumber
- 11 of 40 softwood sawmills or 28% produce machine stress rated or machine evaluated lumber
  
- 4 of 8 pole mills or 50% having pole treating equipment
- 3 of 5 post mills or 60% having post treating equipment

The following table shows the number of mills by mill type with dry kilns and/or specialized drying equipment on site as part of the manufacturing process. *See Table 4.*

<b>Table 4. Mills with Dry Kilns or Specialized Drying Equipment</b>			
	Dry Kiln/Specialized Dryers	Total	% Dry Kiln/Specialized Dryers
Sawmills	53	97	55%
Log Home Mills	2	3	67%
Panel/Engineered Wood Mills	6	6	100%
Pellet Mills	8	8	100%
Pole Mills	6	8	75%
Post Mills	2	5	40%
Shavings Mills	1	10	10%
Veneer Mills	3	3	100%

The following table shows the number of mills by mill type that utilize a wood-fired boiler on site as part of the manufacturing process. *See Table 5.*

<b>Table 5. Mills with Wood-Fired Boilers</b>			
	Wood-Fired Boilers	Total	% Wood-Fired Boilers
Sawmills	17	97	18%
Panel/Engineered Wood Mills	1	6	17%
Pole Mills	4	8	50%
Post Mills	1	5	20%
Shavings Mills	1	10	10%
Veneer Mills	1	3	33%

## Mill By-Products

Mill by-products are produced in the manufacturing of primary wood products. The most common types are bark, chips, sawdust, shavings and specifically to the pulp process - black liquor. These by-products are practically all (99.9 + %) utilized. Utilization occurs at the primary mill as fuel for boilers and/or dry kilns or is sold on the market for a variety of products. These products include chips for the pulp industry; bark for mulch or fuel; sawdust for animal bedding; boiler fuel or wood energy pellets and shavings for animal bedding, boiler fuel or wood energy pellets. In addition, black liquor is an important fuel for the boilers at a pulp mill.

Two post mills, three pole mills and eighteen sawmills sell by-products (sawdust & shavings) for use in manufacturing wood pellets. Two sawmills manufacture their own pellets using their residues.

The following table shows by mill type how by-products are utilized. *See Table 6.*

<b>Table 6. Mill By-Products and Usage by Mill Type</b>					
	Utilizes Internally Only	Utilizes Internally & Sells Externally	Sells Externally Only	Some By-Products not Utilized	No By-Products Produced - All Material Used
Mill Type	<i># of Mills per Category</i>				
Chip/Log Exporter					5
Biomass Electricity					3
Biomass Pellets	1	1			
Firewood					8
Log Home		1	2		
Mulch					7
Panel & Engineered Wood	1	4			1
Pole		6	2		
Post		1	5		
Sawmills **	3	28	57	9*	
Shavings	1	1	1	2*	5
Veneer		1	2		
* The volume of By-products not utilized is very small compared to the total By-products produced in all forest product primary manufacturing. ** One sawmill operates a co-gen biomass electricity plant for its own use with by-products					

In addition to the mills listed in the above table, all (12) pulp and paper mills use mill by-products for boiler fuel and some of these pulp mills also use biomass for electricity co-generation.

**Forest Utilization Services:**

<http://www.gatrees.org/utilization/ForestUtilizationServices.pdf>

**Forest Utilization Staff:**

<http://www.gatrees.org/utilization/staff/index.cfm>

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