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Director's Note

I write this message with mixed emotions. We are about to celebrate the retirement of a true friend of the Center. Later in this Focus you will read more about Joanne, but I wanted to share my thoughts on what she has meant to the department and Center. When I think of the Center for Forest Products Marketing and Management, I think of Joanne Buckner. She worked diligently to help Steve get it started, and her enthusiasm remains to this day. Probably no one person has ever represented the Center better than Joanne. Joanne's dedication to students and Center members has been the focus of her efforts since its inception. She has worked with 3 different directors and a number of communication/marketing support personnel. She always was willing to assist or adapt to their various demands. I very seldom travel, when a Center member does not ask me about Joanne. She has been your primary contact for 15 years. When members visit us, they prefer to spend time with her and not me (I wonder why?) She remains in contact with a number of our past students and has pictures of their children in her office. Joanne truly likes working with people (a good marketing lesson) and it came through in everything she did for the Center. I am going to

miss her beating me to work at 7 AM and I am going to stop wondering why I get emails from her at 8 PM on Friday nights. You know that our work teams become families and Joanne was like a mother to many of us. We will never be able to replace her, but we will find another person to handle her duties. I want to thank her for 15 wonderful years with the Center, wish her the very best of retirements and I hope she will take time to appreciate the blessing she has given all of us with her efforts.

Bob

Annual Meeting Summary

The Center held its 14th annual meeting on September 28th in conjunction with Wood Week. For those that were unable to attend the meeting, it covered: activities of the previous year; the Department's recruiting efforts; the Sloan Forest Industry Center; on-going wood industry transportation research; the recent member survey; and a planning session. In the planning session participants formed small groups and discussed questions about the wood industry and the Center's role in the industry. A summary of participant responses is presented below.

1. What 3 questions regarding the future of the wood products industry would you like answers to?

A large portion of respondents wanted to know how the domestic industry will compete globally. Education and human resources available in the future concerned a number of participants. The future availability of raw materials and natural resources were important issues. Questions regarding the uncertainties of new products, technologies, and markets were also posed. Furthermore, respondents had questions about internships, recycling and residues, and certification.

2. What do you think the wood products industry will look like in 2015?

The consensus seemed to be that the industry will be more consolidated in the future than presently. Participants suggested that there will be a greater use of technology which will lead to greater efficiencies and less labor intensive production. New and custom wood products, along with different product mixes, will be developed and/or offered in the future. Increased use of engineered wood products and substitute products was also suggested as future realities. Other characteristics of the wood products industry in 2015 that were suggested included: higher prices, global integration, more diversification and increased outsourcing.

(Continued on next page)

JOANNE BUCKNER'S RETIREMENT



Joanne Buckner was born in Oswego, New York. She graduated from Hannibal High School in Hannibal, NY, and then began work in the Syracuse area for a country and western radio station. She began her office management skills accumulation there. Her path led her to Texas and a coin operated amusement machine company. Joanne, then moved to Roanoke, Virginia and started her 20+ year career in the Department of Wood Science & Forest Products at Virginia Tech. Joanne works closely with a number of department faculty members and manages

a large portion of the mailing lists used for regular communication with Center members, alumni and friends. She has worked for the Center for Forest Products Marketing and Management since its inception in 1992. She was instrumental in supporting Dr. Steve Sinclair in establishing the Center and has worked with all three of its directors, Drs. Steven Sinclair, Robert Bush and now Bob Smith.

She established the resume listing of students and regularly coordinates interviews for the Departments' students with potential employers. All employers enjoy working with Joanne and regularly state how well she runs the interview process. Joanne is a regular reviewer and editor of all manuscripts that are produced by Center faculty and has reviewed more theses and dissertations for grammatical errors than she wants to remember. Joanne's dedication to work is evident in her early arrivals and late departures. How does a person establish a balance with such a work ethic? Joanne offers her other hobbies; "Spoiling my grandchildren and great-grandchildren, crocheting, reading, yard sales, Elvis, NASCAR, and bus tours." One of her hobbies that she told about was that of giving Bob Smith a "hard time."

Joanne has seen a lot of significant changes over her career with the introduction of computers and email which have improved job efficiency. But she says that since computing has made her job easier and faster that there seems to be more work now than in previous years. Joanne has enjoyed her job's flexibility and freedom; contact with students and Center members; and "the fun that I can have". Joanne plans on retiring on January 31st, 2006. Joanne plans on moving to rural Ohio to be closer with her family and sleeping in late during her retirement. Although Joanne is looking forward to retirement, she says "I'm going to miss everyone and I've enjoyed working with all of you". All of us in the Center and Department will miss Joanne and wish her the best. THANK YOU JOANNE!

Annual Meeting Summary (Continued)

3. With questions 1 and 2 in mind, what resolvable issues can be addressed by undergraduate, graduate and extension activities by the Center/Department?

Respondents suggested various research projects such as surveys, feasibility studies, and competitive analyses. A number of contributors suggested increasing enrollment and studying the education needs of the industry. Other ideas included offering novel short courses and doing more to promote the industry.

4. What do you believe is the best focus of future Center efforts to assist the wood products industry to meet the changing needs of the industry?

The two main responses were for the Center to focus on human resources issues and education; and extension and research activities. Others proposed emphasizing products, manufacturing processes and information.

Center Focus



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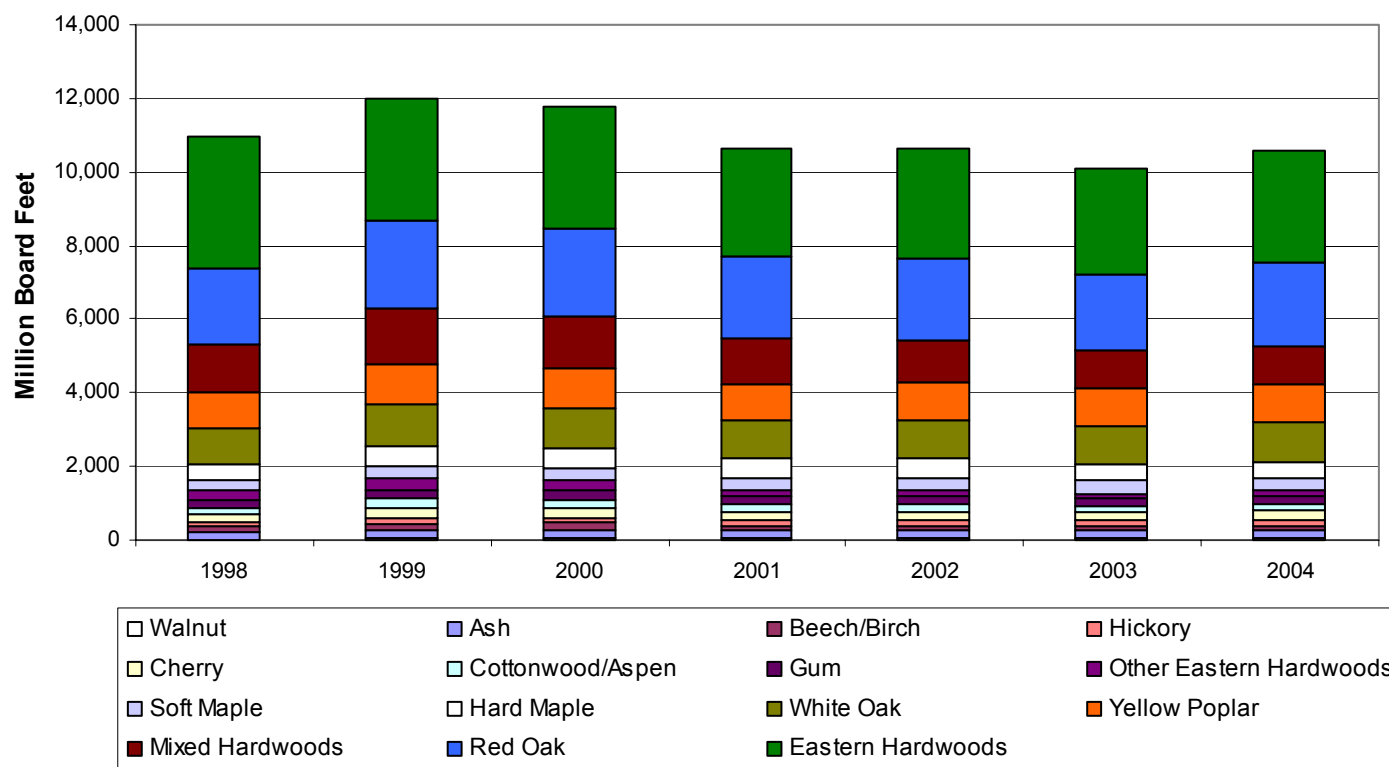


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DOMESTIC LUMBER PRODUCTION

Lumber production is an important part of the forest products industry. Eastern hardwood lumber production in 2004 was 10.5 billion board feet which is 3.6% below 1998 levels according to data from the U.S. Census Bureau. As shown in the chart below, the "Eastern Hardwoods" category, which are "not specified by kind", leads all other categories in lumber production followed closely by Red Oak, Mixed Hardwoods, Yellow Poplar, White Oak, Hard Maple and Soft Maple. Mixed Hardwoods include mixed, un-graded hardwoods sawn for ties, timbers, blocking, cants, and pallet stock. "Eastern Hardwoods" and "Mixed Hardwoods" lumber production declined 15.3% and 20%, respectively from 1998 to 2004. Some notable increases in 2004 lumber production from 1998 quantities include Walnut (103%), Hickory (49%), Soft Maple (18%), and Cherry (17%). Red Oak and White Oak lumber production in 2004 increased 9.5% and 11.3%, respectively from 1998. Hardwood lumber exports have increased from 10% of production in 2001 to 11.7% of production in 2004.

Eastern Hardwood Lumber Production

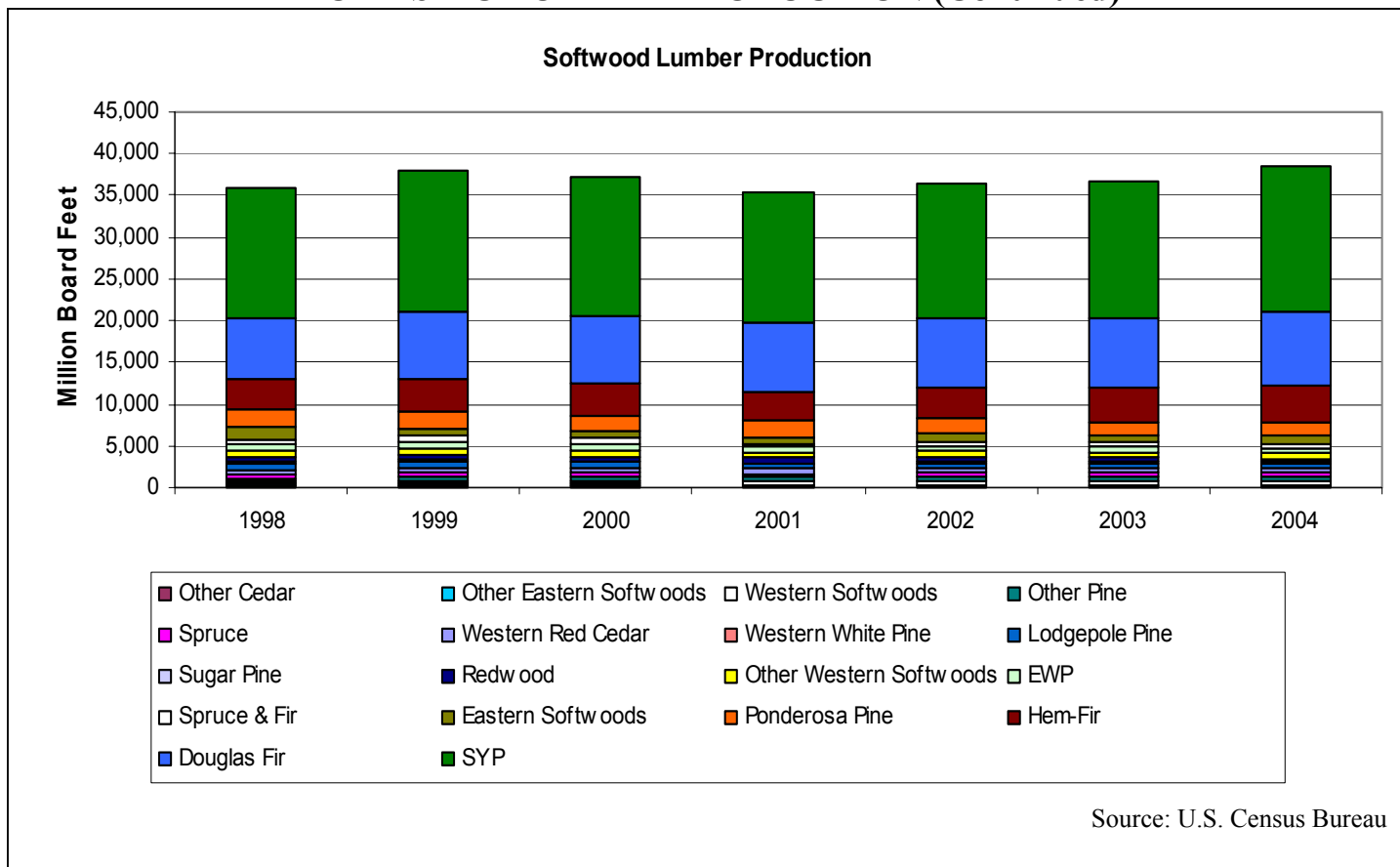


Source: U.S. Census Bureau

One could presume, based on this production data, that softwood lumber production was less affected (notice the shallower trough) by unfavorable economic conditions present in 2001 & 2002 than hardwood lumber production which has yet to recoup 1999 production levels. Softwood lumber production, as shown in the chart on the following page, was 38.5 billion board feet in 2004 which is 7.3% greater than 1998 levels. Southern Yellow Pine (SYP) dominates softwood lumber production and has increased its share of production from 43% in 1998 to 45% in 2004. Softwood lumber imports continue to grow, increasing from 36.5% of domestic consumption in 2001 to 38.2% in 2004. Softwood lumber production in 2004 declined from 1998 levels for the following species: Other Eastern Softwoods (46%), Eastern Softwoods [not specified by kind] (39%), Lodgepole Pine (39%), Redwood (31%), Western Spruce (21%), Ponderosa Pine (20%), Eastern Spruce & Fir (20%) and Sugar Pine (15%). Softwood species that exhibited increases in production from 1998 to 2004 include: Other Pine [Eastern] (77%), Western Softwoods [not specified by kind] (25%), Douglas Fir (21%), Hem-Fir (20%), Western Red Cedar (19%), and Southern Yellow Pine (12%).



DOMESTIC LUMBER PRODUCTION (Continued)



Calendar of Events

Center for Forest Products Marketing & Management

December 1-2, 2005

Selling Forest Products Short Course

The basics of personal selling will be taught so that current or new sales personnel can improve their efficiency and effectiveness.

December 7-9, 2005

Oak Drying Short Course

The course will cover the basics of lumber drying, air-drying, lumber handling, pre-dryer and kiln operation, schedules, conditioning, and quality control procedures. Location: Hotel Roanoke and Conference Center in Roanoke, VA

January 31, 2006

Joanne Buckner Retirement

Congratulations Joanne! I'll send my thesis in the mail!