

Missouri Economy Indicators

Forestry and Related Product Manufacturing

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In Missouri, forests cover 15.4 million acres — a third of the state’s landscape. Oak, hickory and other hardwoods dominate Missouri forests. The state’s paper product manufacturers, however, largely process imported softwoods. Tree and wood processing contribute to Missouri’s value-added agricultural activity.

Although mechanization and competition have reduced jobs in the *Forestry and Related Product Manufacturing* industry, employment remained relatively stable in the past 10 years. Jobs declined by 3% from 2011 to 2021, but much of the employment loss occurred after the COVID-19 pandemic began.

Forestry and Related Product Manufacturing

Missouri’s forestry, logging, wood product and paper product manufacturers employed nearly 16,500 workers at 677 business locations in 2021.

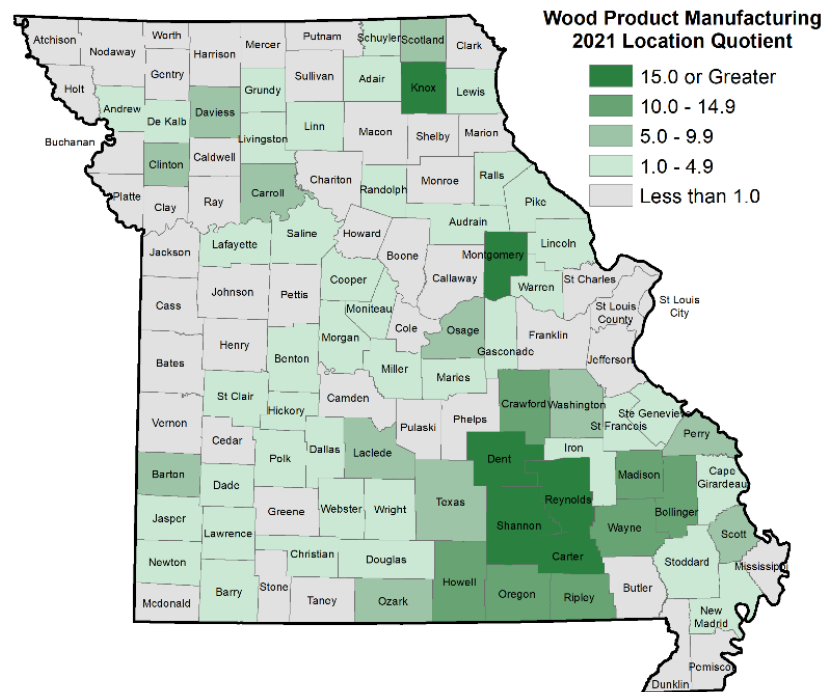
Half of these jobs — 8,200 — were in wood product manufacturing. That included 2,200 sawmill jobs. In Missouri, wood product manufacturers make goods such as wood barrels, pallets, flooring, trusses and charcoal.

Most wood product manufacturing jobs concentrate in southeastern Missouri near forested areas and logging operations. See map to right.

Major wood product employers operating in Missouri include Havco Wood Products, Independent Stave Company and MiTek.

Wood Product Manufacturing Job Concentration, 2021

Jobs are concentrated in darker shaded areas



Source: MU Extension graphic using 2021 EMSI Burning Glass and Bureau of Labor Statistics data. Location quotient (LQ) analysis shows the extent to which an industry concentrates in a particular region compared with the nation overall. An LQ of 5.0 means an industry is five times more concentrated in jobs than the national average.

Missouri Harvests Primarily Oak and Other Hardwood Species

Missouri’s forests and wood product manufacturers are internationally known for supplying white oak barrels and black walnut veneers. According to the Missouri Department of Conservation, the top three species

harvested in 2019 by volume were red oak, 44%; white oak, 28%; and hickory, 7%. Although Missouri harvests a relatively smaller volume of black walnut logs, those logs carry a high value.

Missouri had 277 logging and sawmill businesses that employed nearly 3,500 people in 2021, according to EMSI. Since 2011, total employment has declined by 23% in logging operations and 10% in sawmills.

Paper Product Manufacturing Jobs Concentrate Near Urban Areas

Missouri wood product and paper product manufacturers created nearly 6% of the state’s manufacturing jobs — similar to the U.S. average. The state’s paper product manufacturers employed nearly 7,000 people in 2021 and offered the highest average earnings within the forestry and forest products sector.

Unlike wood product manufacturers, which locate primarily in southeast Missouri near timber, paper product manufacturers are dispersed across the state. See map to right. Because they often use imported softwoods, such as pine, paper product companies depend less on timber acreage being nearby.

Goods made by paper product manufacturers include boxes, containers, paper bags and stationery. Because many produce packaging materials, these businesses create jobs in metropolitan counties where manufacturing and logistics firms co-locate.

A Missouri workforce needs assessment found approximately two-thirds of forestry and wood product manufacturing jobs do not require post-secondary education, but they do require on-the-job training. Most employers recruit people who have basic work readiness skills and train unskilled employees internally.

Additional Resources

- [2019 Timber Product Output Report](#), Missouri Department of Conservation
- [Missouri Food, Agriculture and Forestry Workforce Needs Assessment](#), MU Extension, July 2020
- [Missouri distilling industry economic contribution and value chain analysis](#), MU Extension, April 2021

All briefs in the economy indicators series and future updates will be at tinyurl.com/ExceedEconomyIndicators

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Paper Product Manufacturing Job Concentration, 2021

Jobs are concentrated in darker shaded areas

