
Virginia's Logging Workforce

Preliminary Results of the 2014 SHARP Logger Survey

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Virginia's SHARP Logger Survey

- **Virginia's SHARP Logger Survey Provides**
 - Characteristics of Virginia's logging operations
 - Logging business owners attitudes about the future
 - Provides data that allows us to track changes over time



Virginia's SHARP Logger Survey

- **Virginia is a diverse state**
- **Operations vary substantially and survey data allows us to make generalizations by regions to describe the logging workforce**
- **Surveys provide a lot of data**
- **2014 survey data is still preliminary**

Virginia's SHARP Logger Survey

- **Mail Survey of all VA SHARP loggers**
- **Two parts, one for all SHARP Loggers, one for Logging Business Owners**
- **Conducted in 3rd and 4th Quarter 2014**
- **Second comprehensive Virginia logger survey**
 - **Previous survey was completed in 2009**
 - **Worked with Chad Bolding and John Munsell**
 - **Presented some of the results at the 2010 VLA meeting**



2014 Survey Response Rates

- **1600 Questionnaires**
mailed to all current
SHARP Loggers
- **847 responses**
- **53% response rate**
- **46% (385) Logging**
Business Owners

2014 Virginia SHARP Logger Questionnaire – All Answers are Confidential – Please Return in the Enclosed Envelope to Receive your SHARP Logger CE Credit.

Part 1: SHARP Logger Program Participant Information (Everyone Completes This Section)

1. What County would you consider to be the center of your work area? _____
2. What is your age? _____ years
3. What is your race? (Please Circle ONE) White/Caucasian Black/African American Hispanic Other _____
4. Gender: (Please Circle One) Male Female
5. Describe your formal level of education (Please Circle One)
did not graduate high school high school graduate some college college graduate
6. Have you ever completed a SHARP Logger Online Training on the SHARP Logger website? (Circle One) Yes No
If YES, please rate your overall experience with the SHARP Logger online trainings:
(Circle One) Very Positive Positive Neutral Negative Very Negative
If NO, Would you ever consider online trainings to earn SHARP Logger CE credits? (Circle One) Yes No
7. Please indicate your preference for the following training formats for SHARP Logger Continuing Education (CE) classes using a scale of 1-5 where:
1=Strongly Dislike; 3=Neutral; 5=Strongly Prefer

Online Training	(Circle One)	1	2	3	4	5
Classroom based training with instructors	(Circle One)	1	2	3	4	5
Video/DVD based training with discussion leaders	(Circle One)	1	2	3	4	5
Outdoors/field based training	(Circle One)	1	2	3	4	5
Combined classroom training with field exercises	(Circle One)	1	2	3	4	5
8. Do you have any suggestions for SHARP Logger Continuing Education class topics that would be useful to you? (Please list)

9. My overall impression of the SHARP Logger classes I have attended is (Please Circle One)
Very Positive Positive Neutral Negative Very Negative
10. Which best describes your occupation? (Please Circle the ONE that is most appropriate)

Logging Business Owner	Logging Company Employee	Landowner
BMP/Site Prep Contractor	Wood Dealer	VDOF Forester or Technician
Industry Forester	Consulting Forester	Retired/No longer in business

Other (Please describe: for example arborist, contract trucker, etc.) _____
11. Have you made any changes or improvements to your operations as a result of attending SHARP Logger programs?
(Circle One) Yes No If Yes, describe if possible _____

12. Do you have any suggestions to improve the SHARP Logger program? _____

If you are NOT a logging business owner, you are done with the questionnaire. Please return in the enclosed envelope.

2014 Business Owner Responses by Region

Mountains (100)



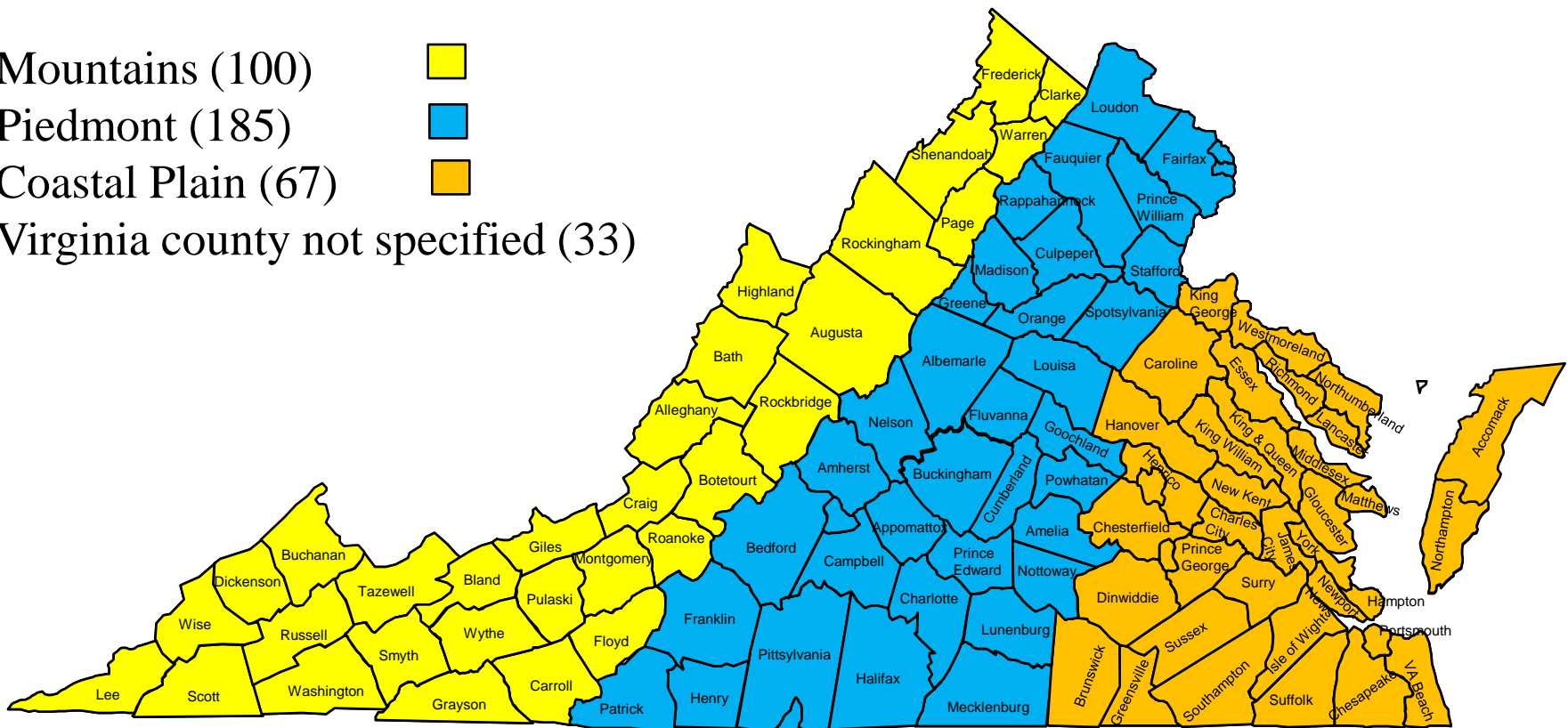
Piedmont (185)



Coastal Plain (67)



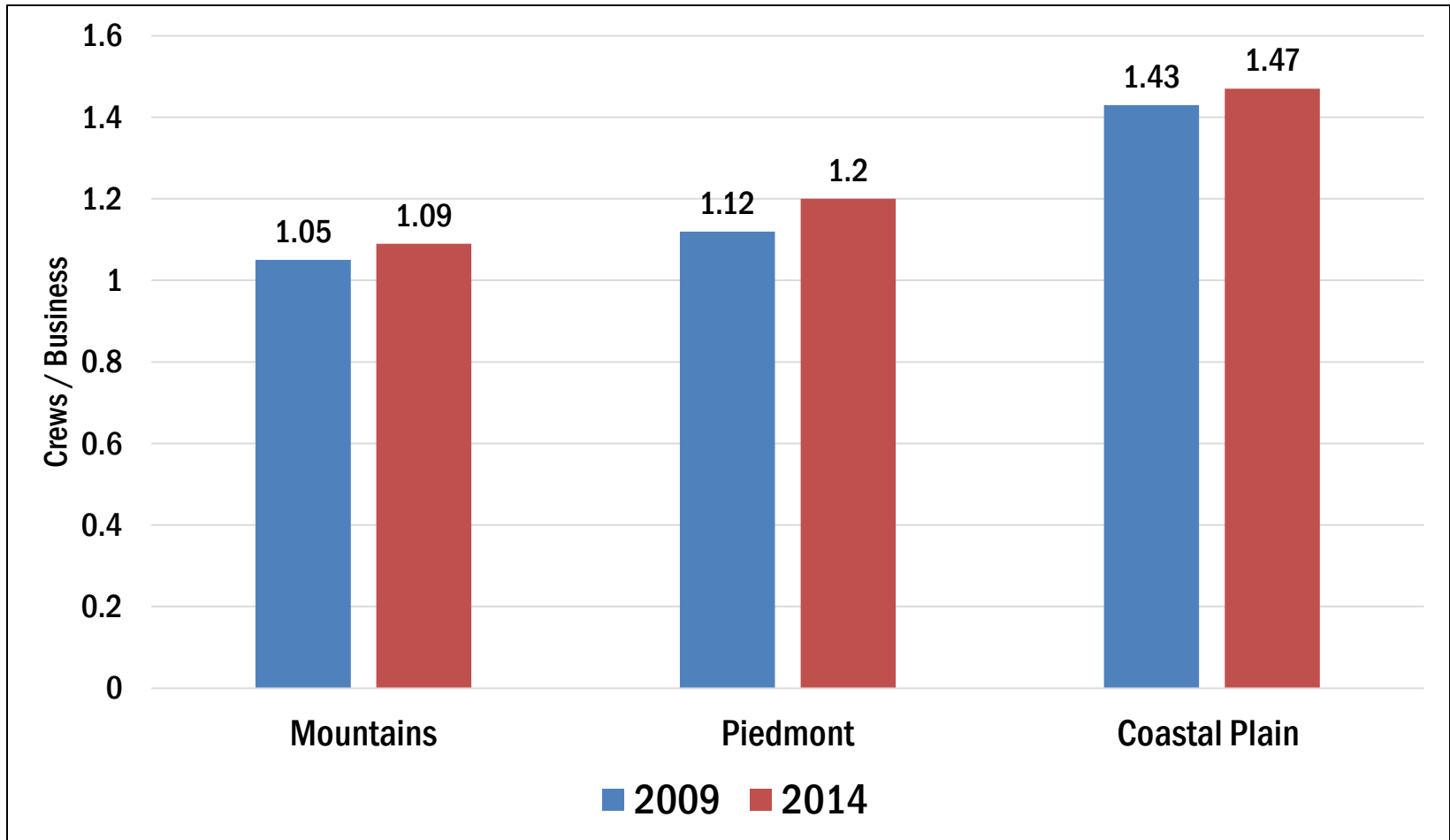
Virginia county not specified (33)



Operational Differences by Region

- **Mountain** operations tend to have lower production levels
 - Often use manual felling (89%) & cable skidders (48%)
 - Primarily hardwood production (82%)
 - Fewer businesses with multiple crews (6%)
- **Piedmont** is a transitional region, often more like Coastal Plain
 - Manual felling (30%), Grapple Skidder (78%)
 - 16 % multiple crew businesses
- **Coastal Plain** operations typically have the highest production
 - Predominantly Mechanized felling & skidding (91%)
 - Primarily Pine Production
 - 27% multiple crew businesses

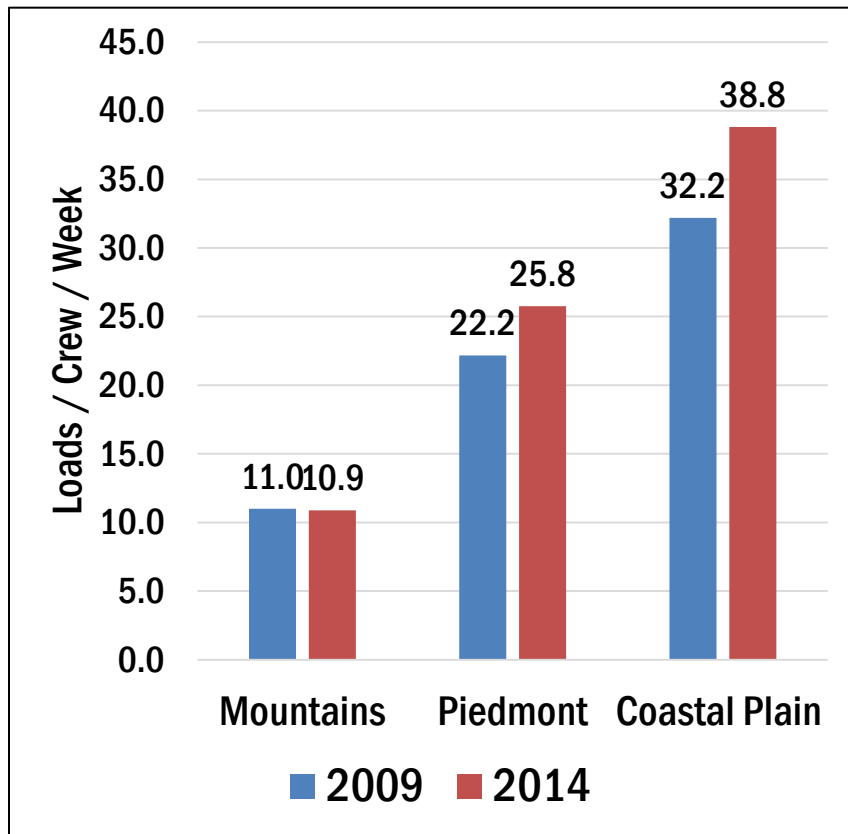
Average Number of Crews per Business



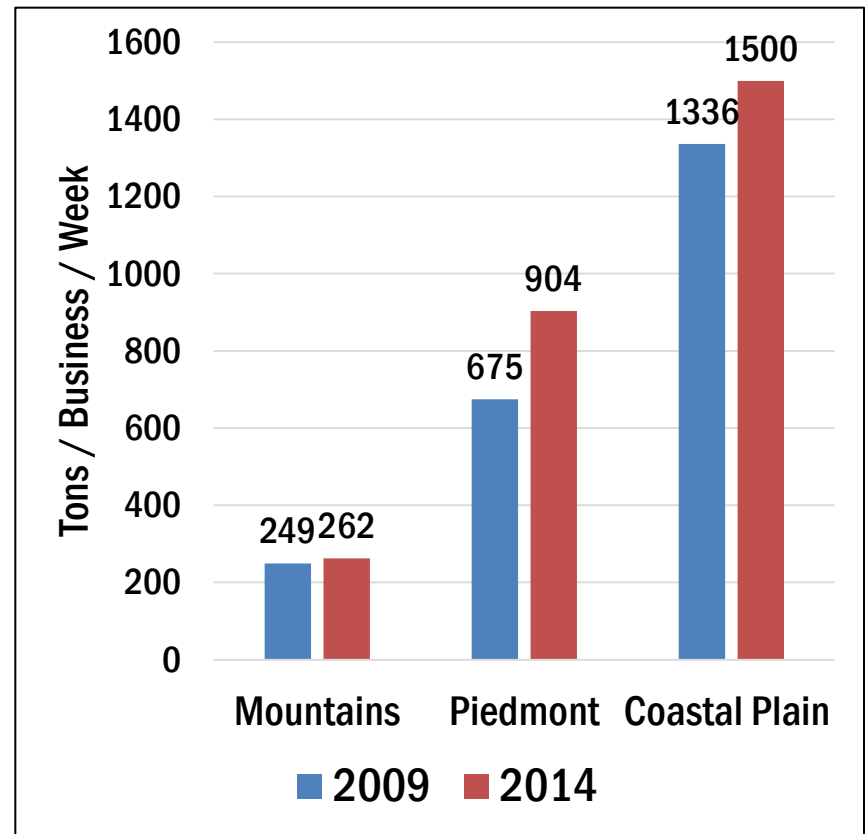


Average Production Rates by Region

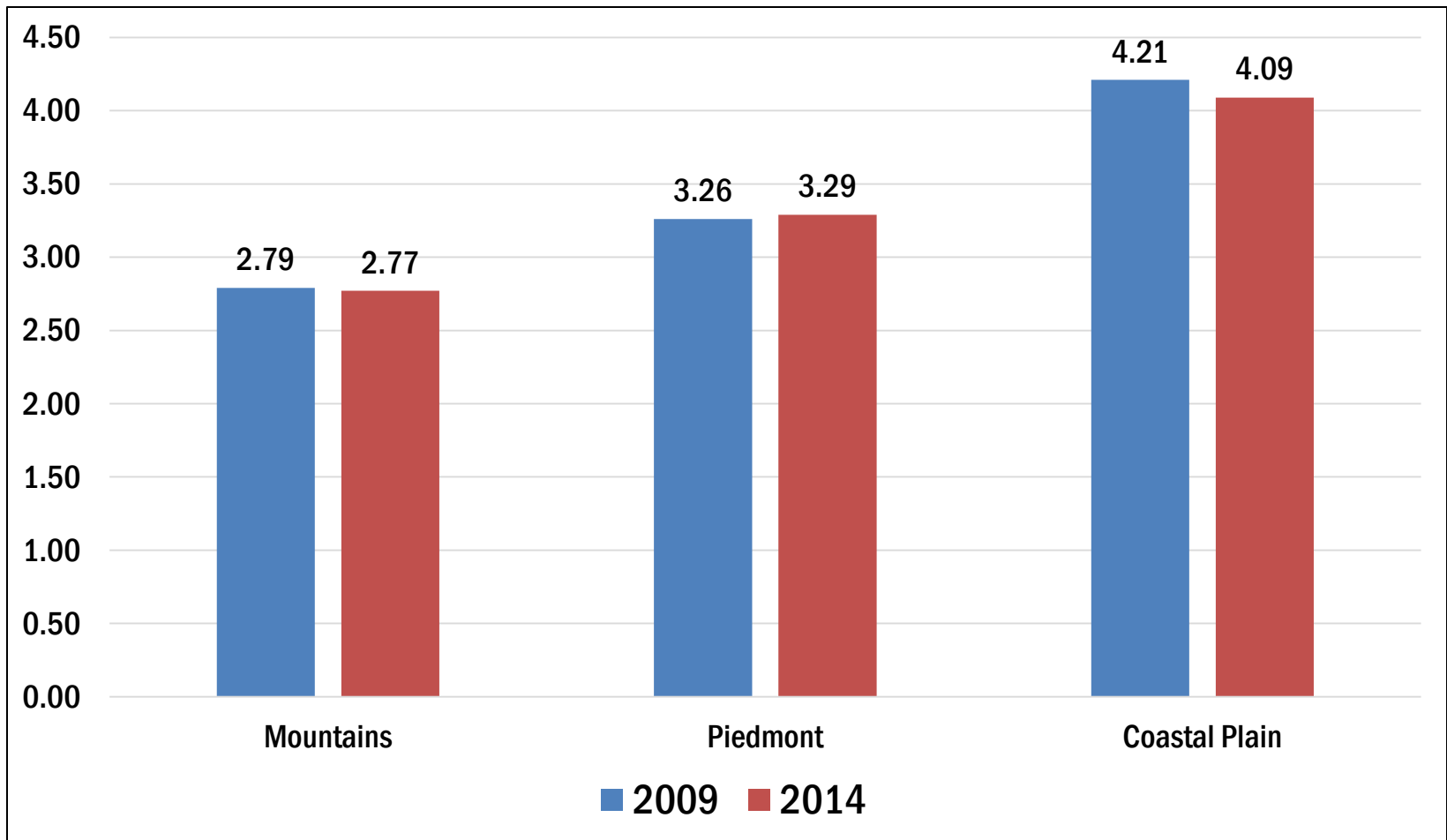
Average Loads / Crew / Week



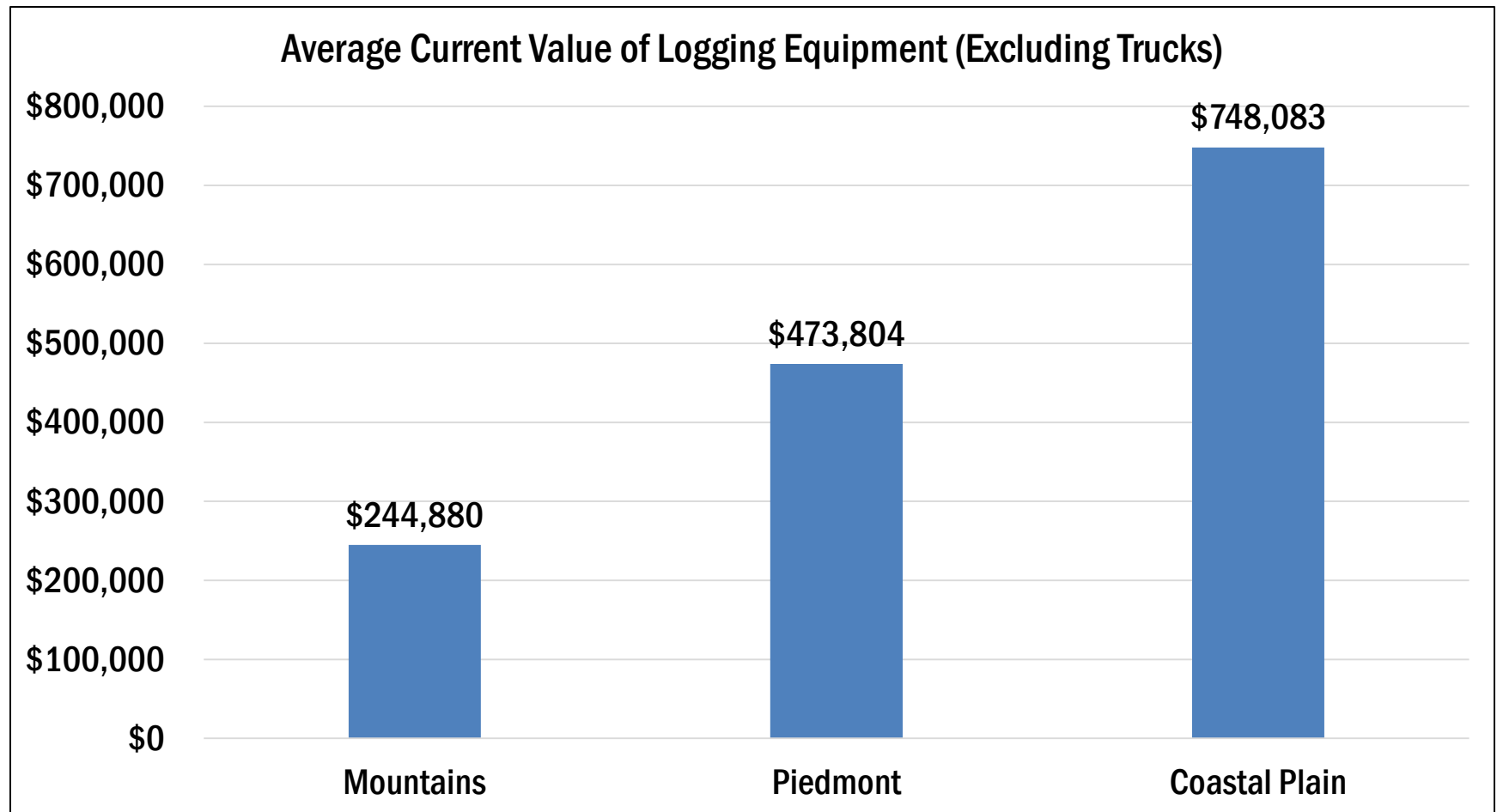
Average Tons / Business / Week



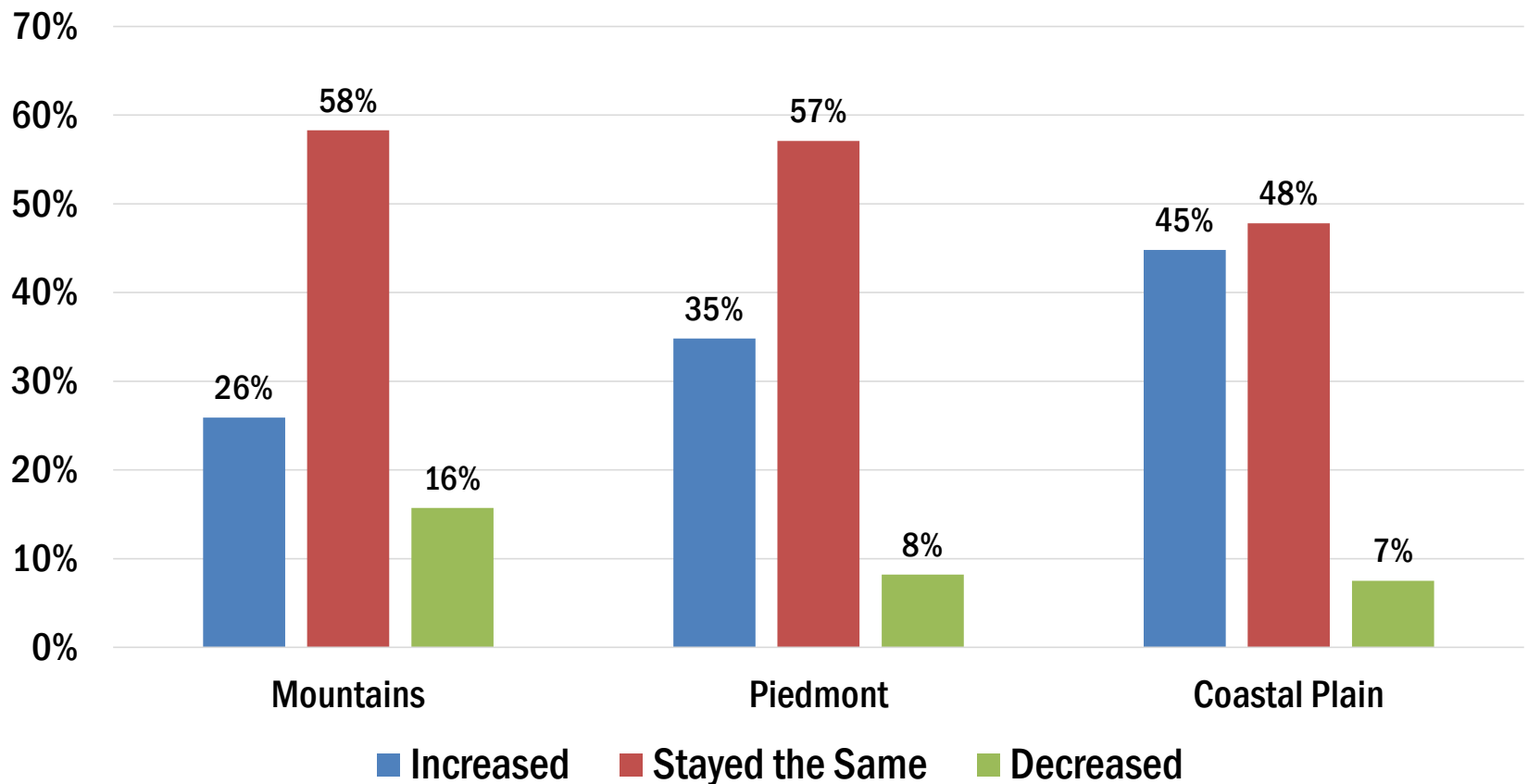
Number of Workers per Crew



What would you estimate is the total current value for all logging equipment used for producing wood (roundwood and chips) on your harvesting operations NOT including trucks & trailers? _____ dollars



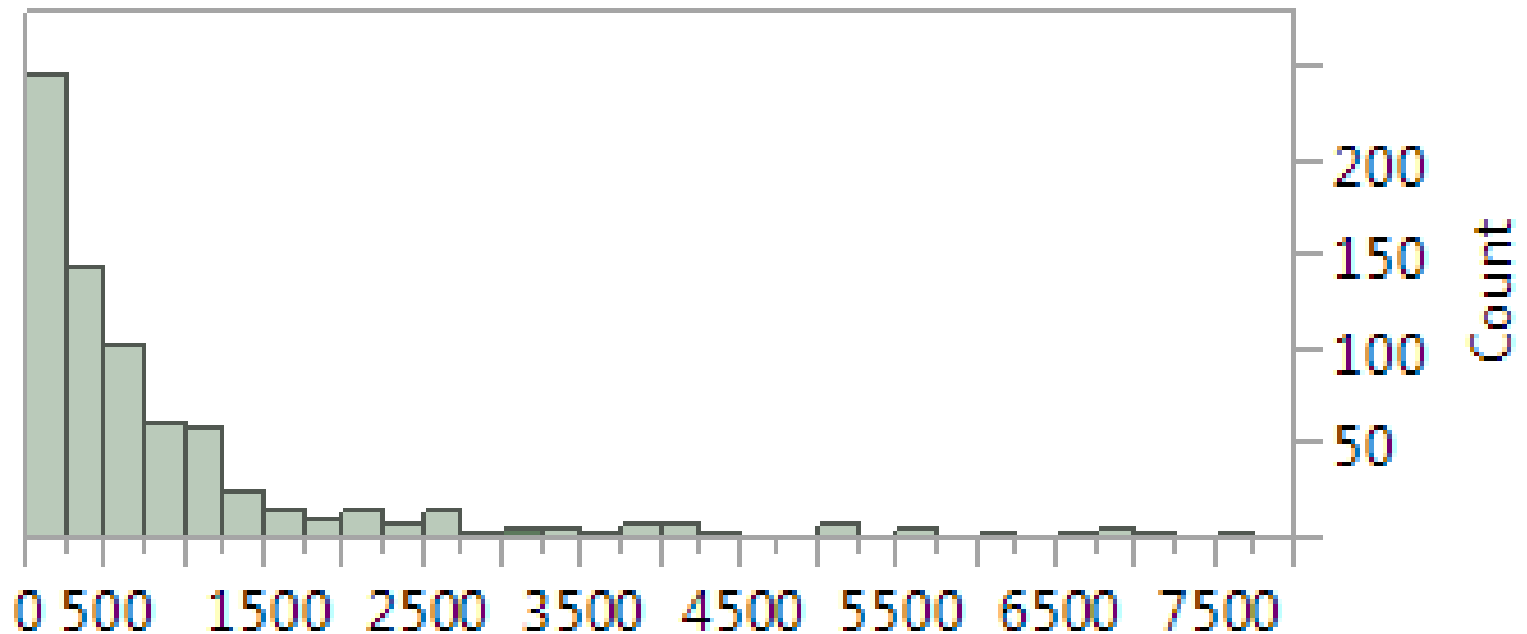
In the past year has your total production increased, decreased, stayed about the same?





Production levels for all logging businesses (tons/ week/business)

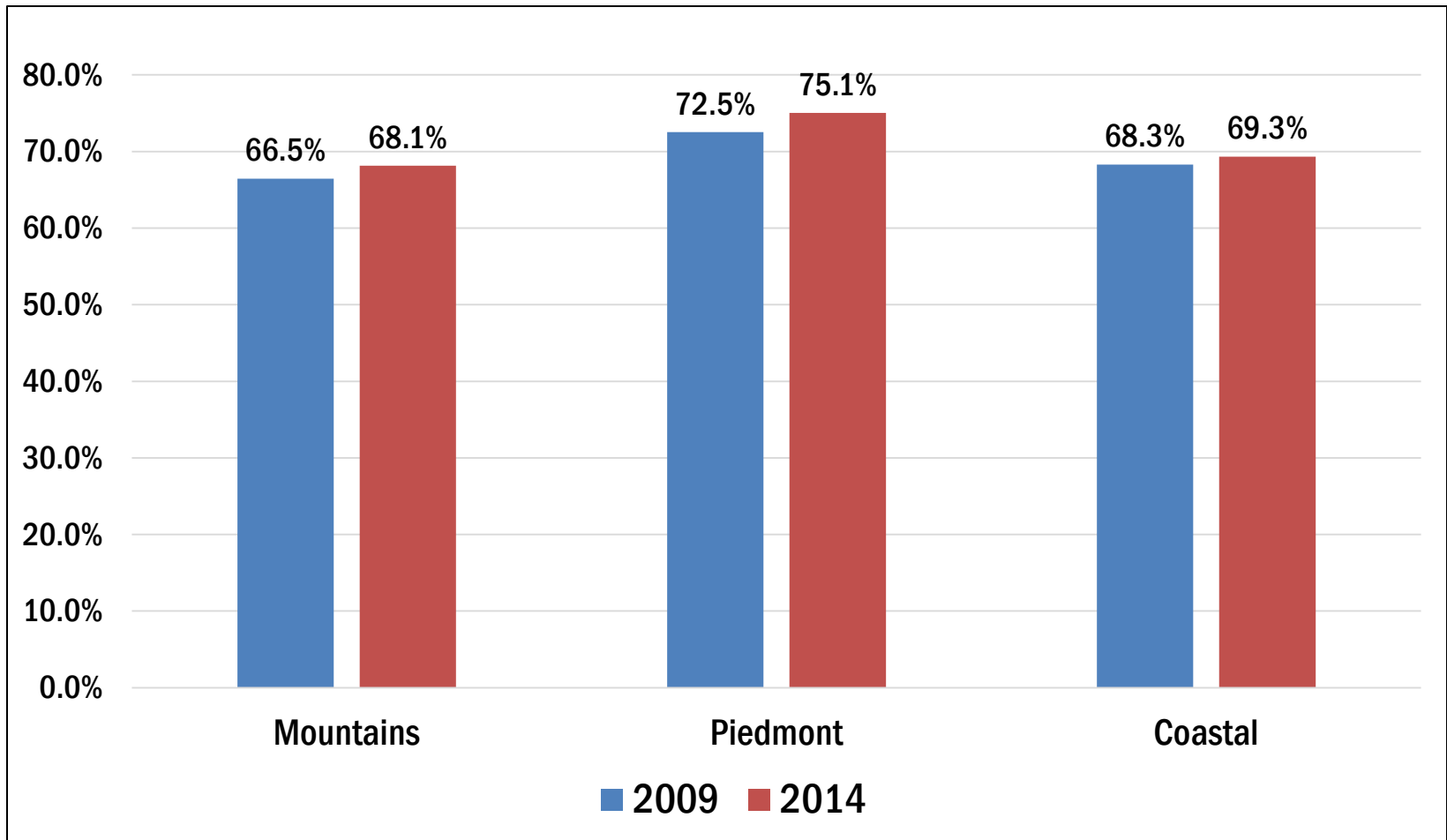
- A lot of smaller operations with relatively low production



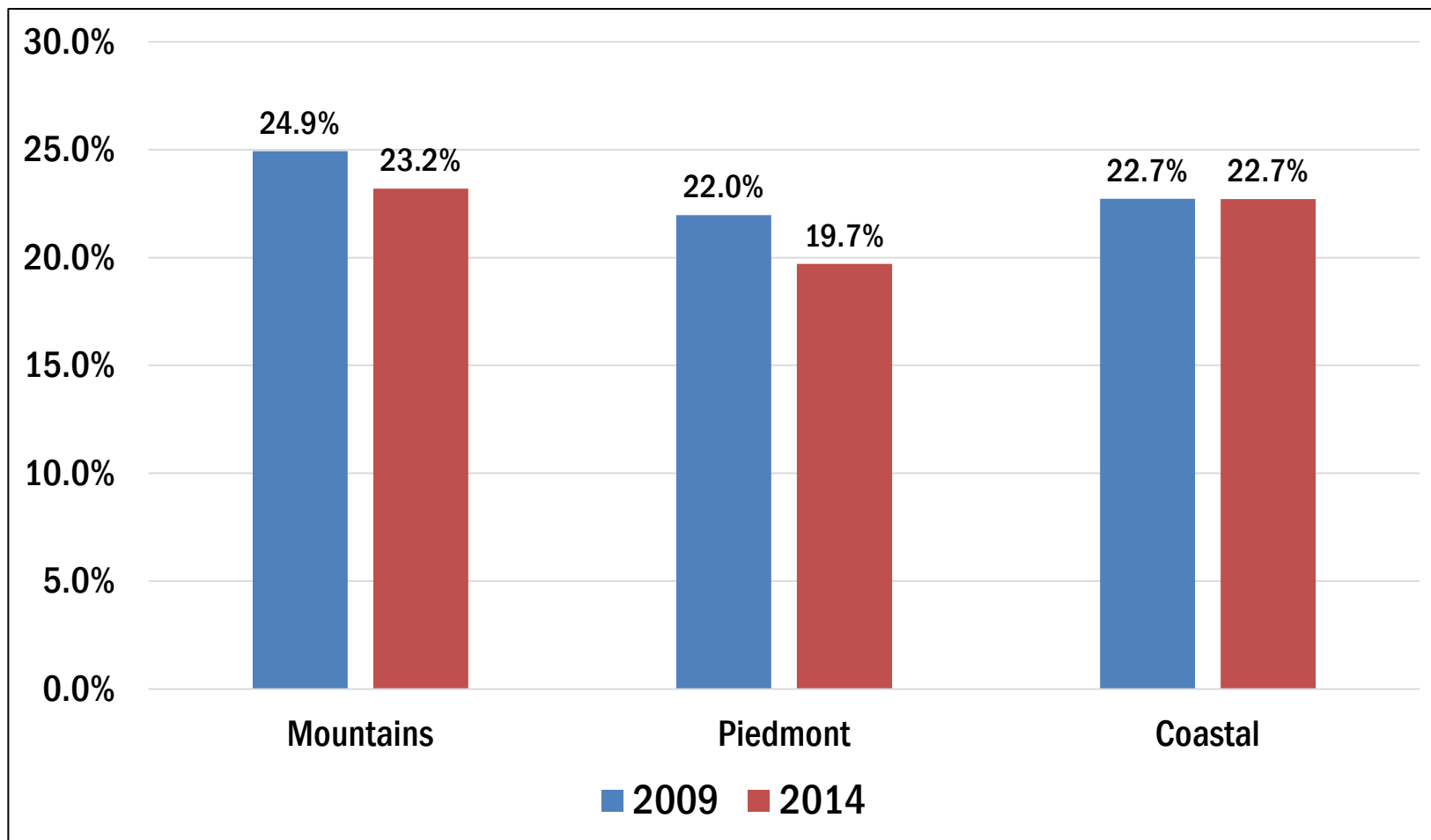
How much production do the larger operations account for?

- **Businesses sorted by region (Mt., Pied., Coastal)**
- **Sorted by weekly production level (tons)**
- **Production level divided into thirds**
- **Production for each “third” of businesses / total production reported by region (tons)**
- **So how much production do the “top third” of businesses account for in each region?**

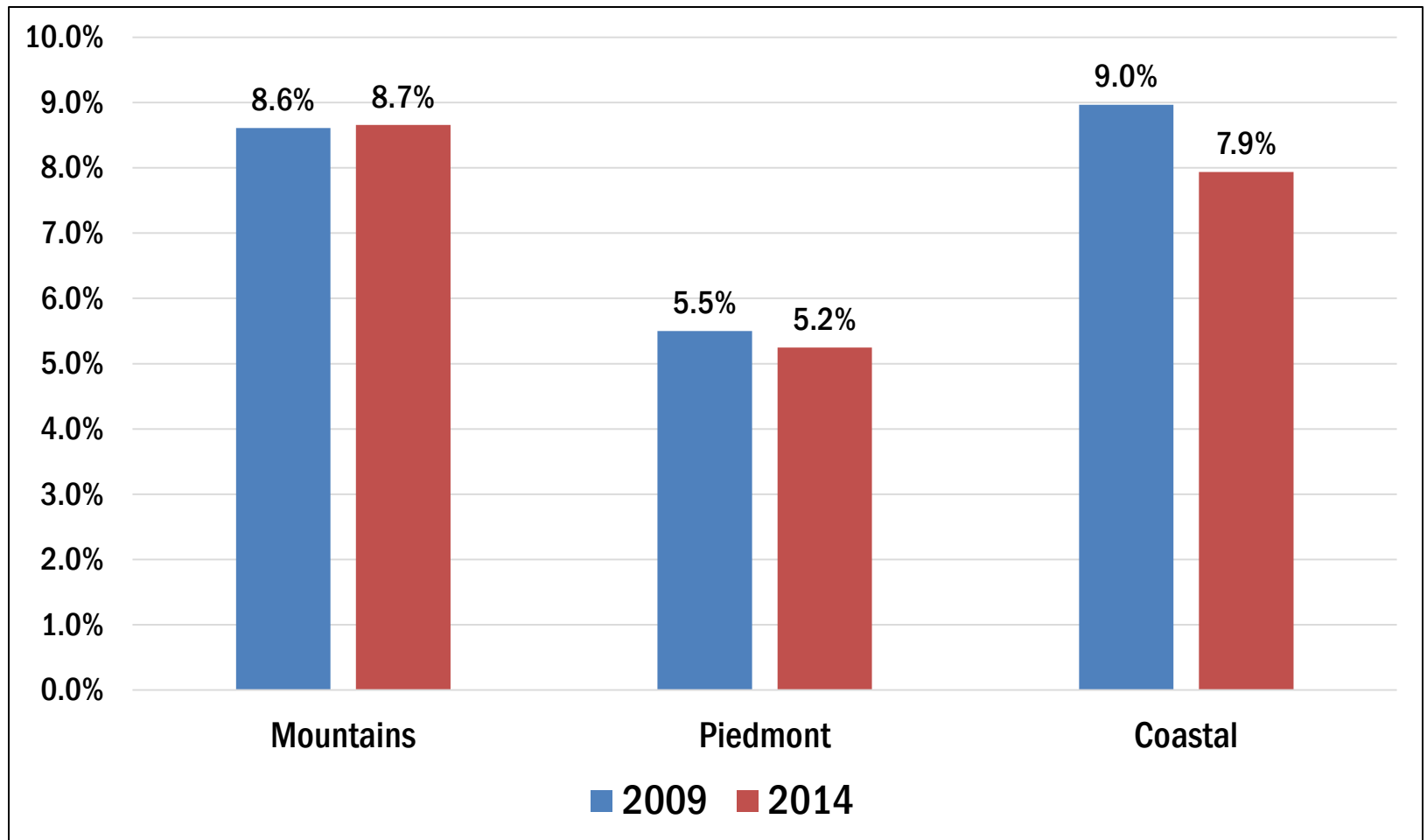
Percent of total estimated production (tons/week) produced by upper 1/3 of businesses (based on reported production)



Percent of total estimated production (tons/week) produced by middle 1/3 of businesses (based on reported production)



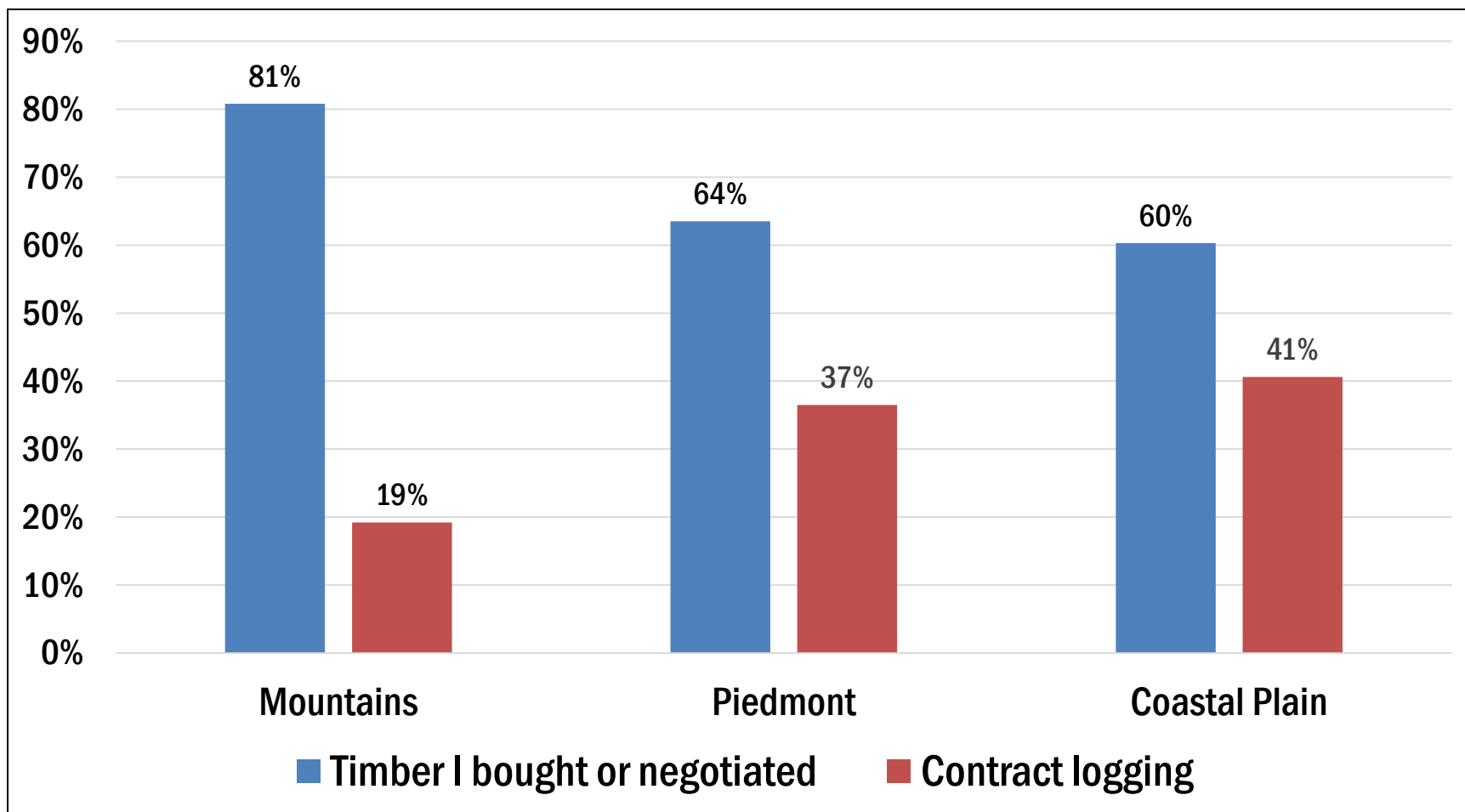
Percent of total estimated production (tons/week) produced by lower 1/3 of businesses (based on reported production)



What percent of the timber that you harvested in the past year came from the following sources? (Should total 100%)

Timber I bought or negotiated_____%

Contract logging of timber bought by someone else_____%

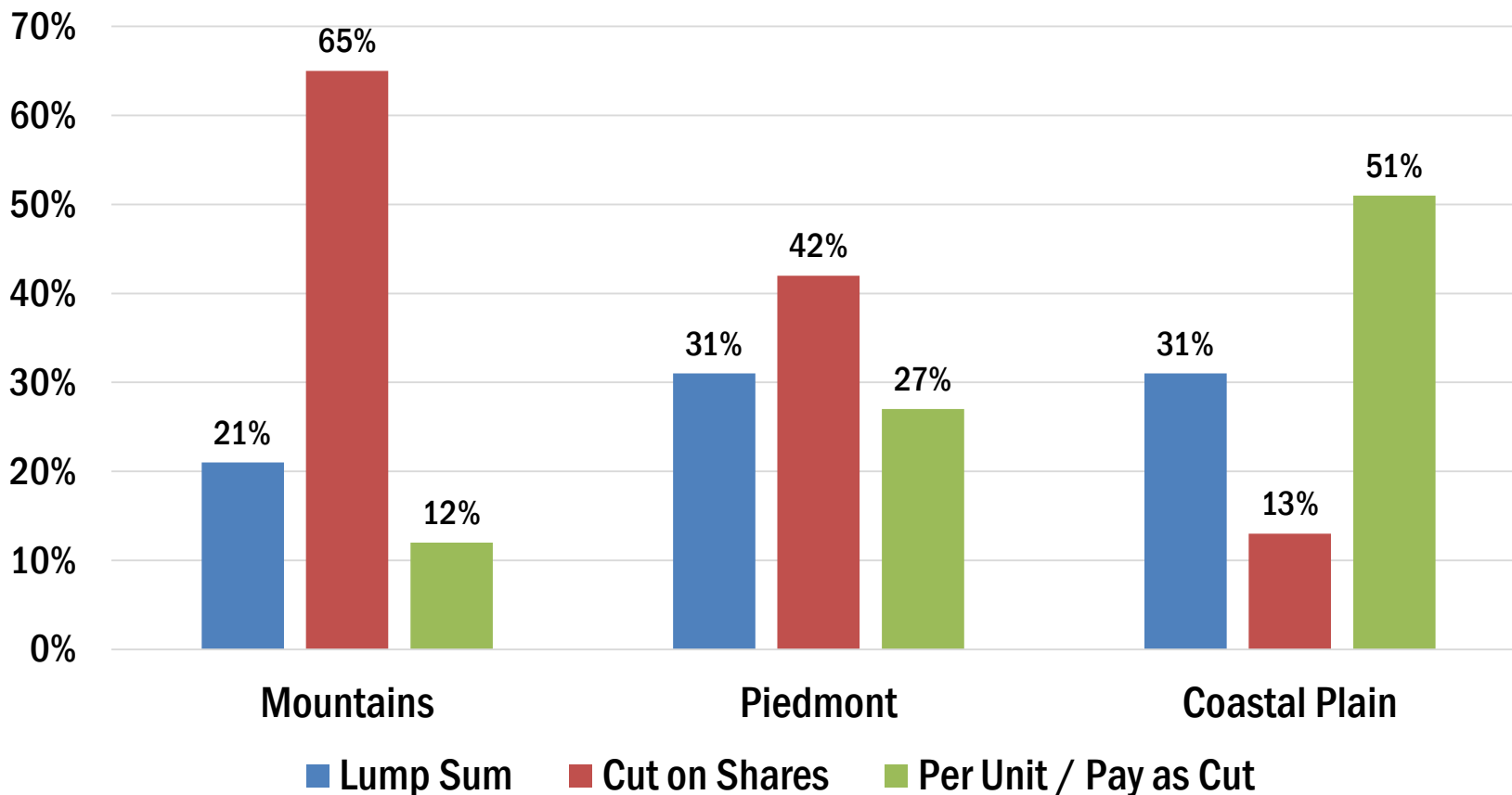


What percentage of the timber you bought in the past year came from the following 3 types of sales? (*Should total 100%*)

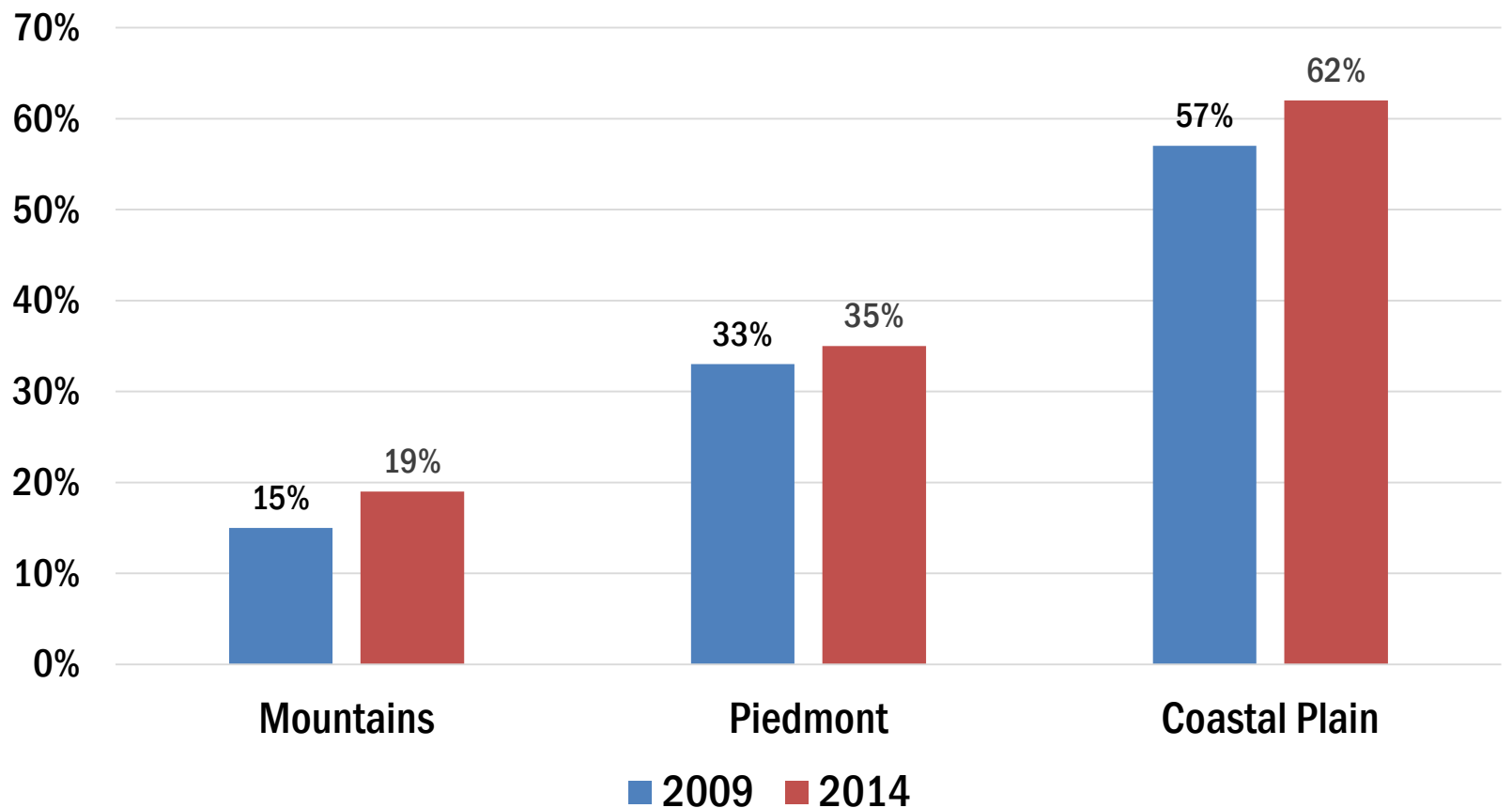
Lump sum timber sale_____%

Cut on “shares” (landowner receives a set percentage of delivered price received as tract is harvested)_____%

Per Unit/ Pay as cut sales (landowner receives a set price per ton/MBF for each ton/MBF as tract is harvested) ____%

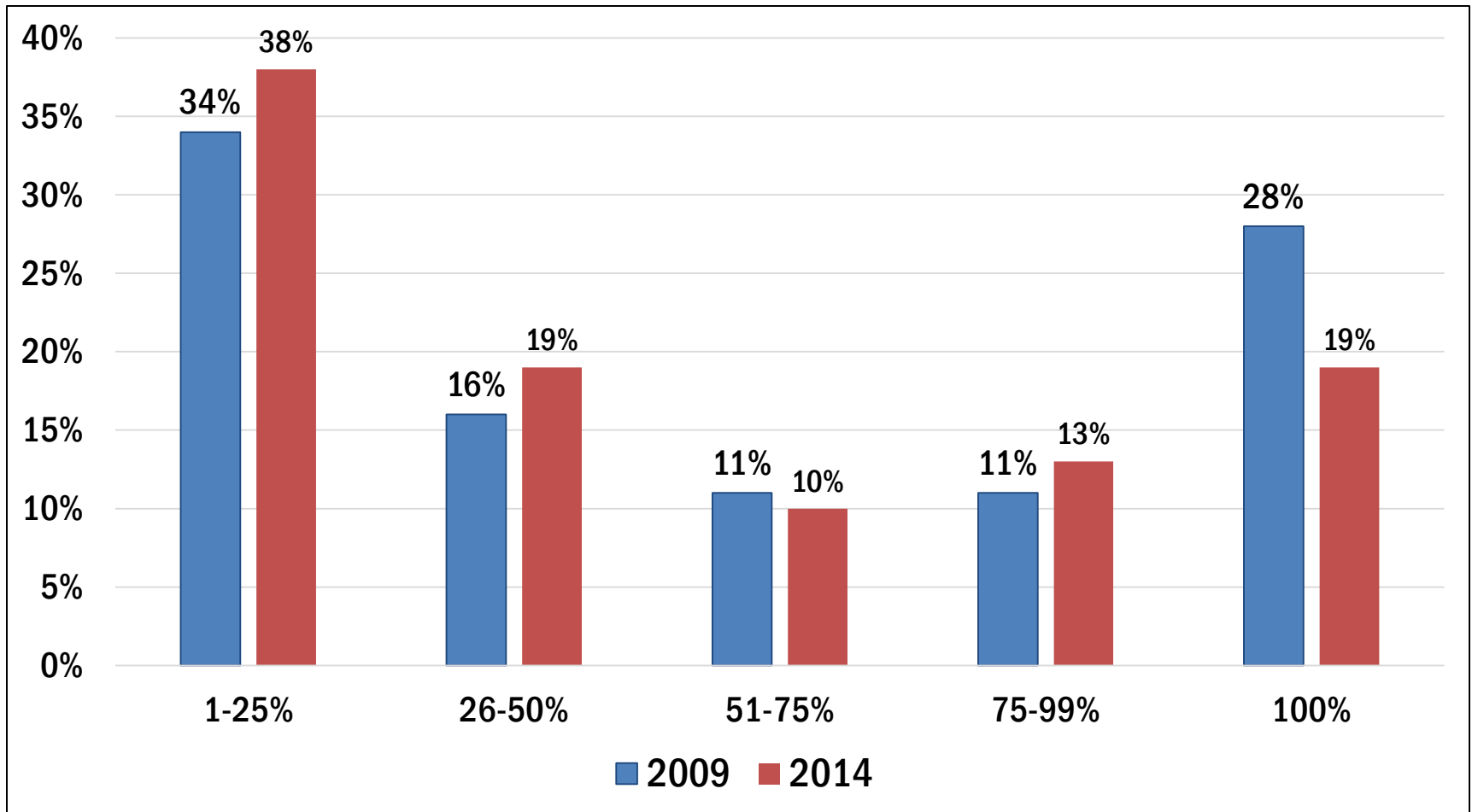


Does your company use contract trucking? (Circle One) Yes No

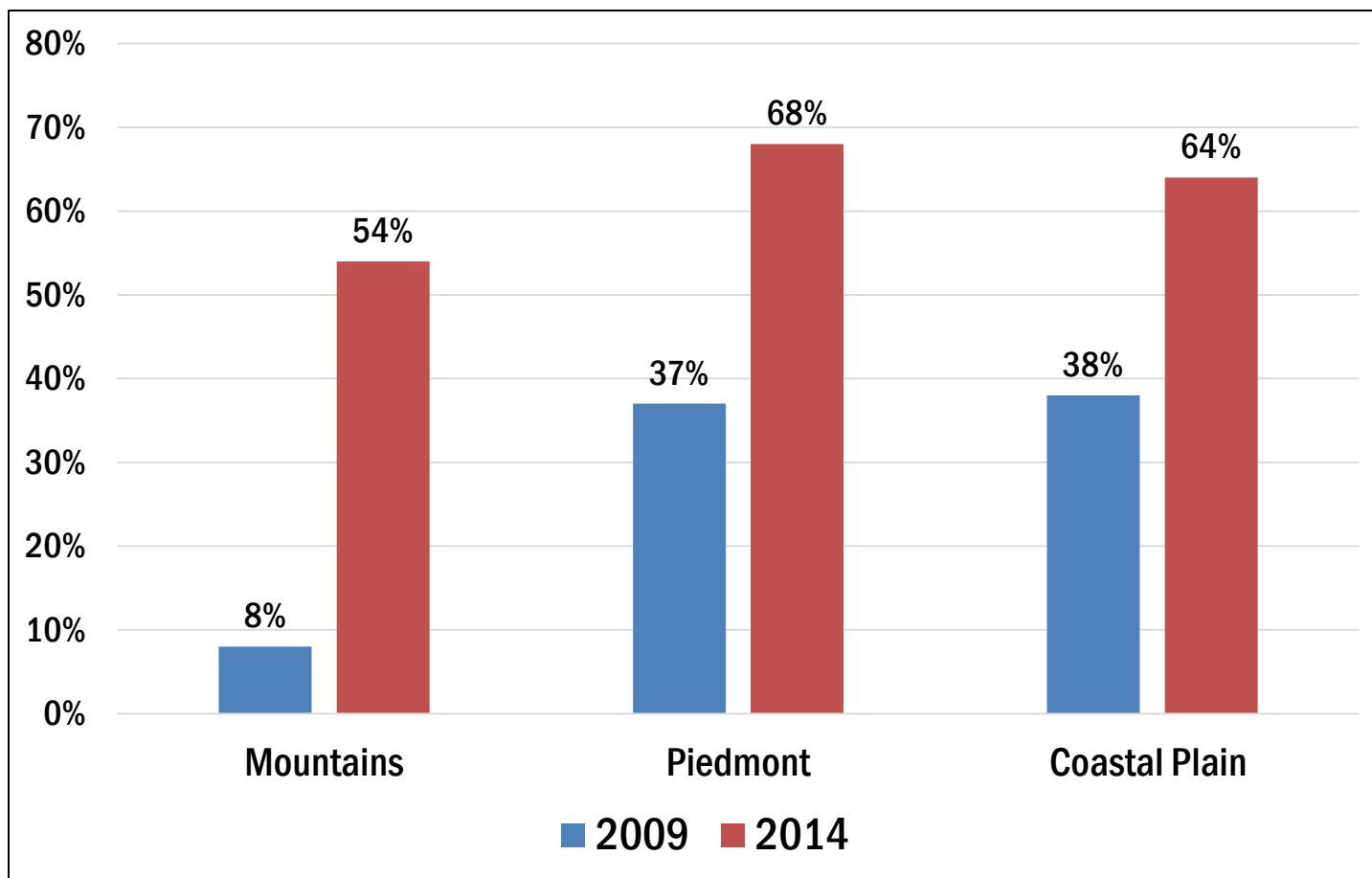


Does your company use contract trucking? (*Circle One*) Yes No

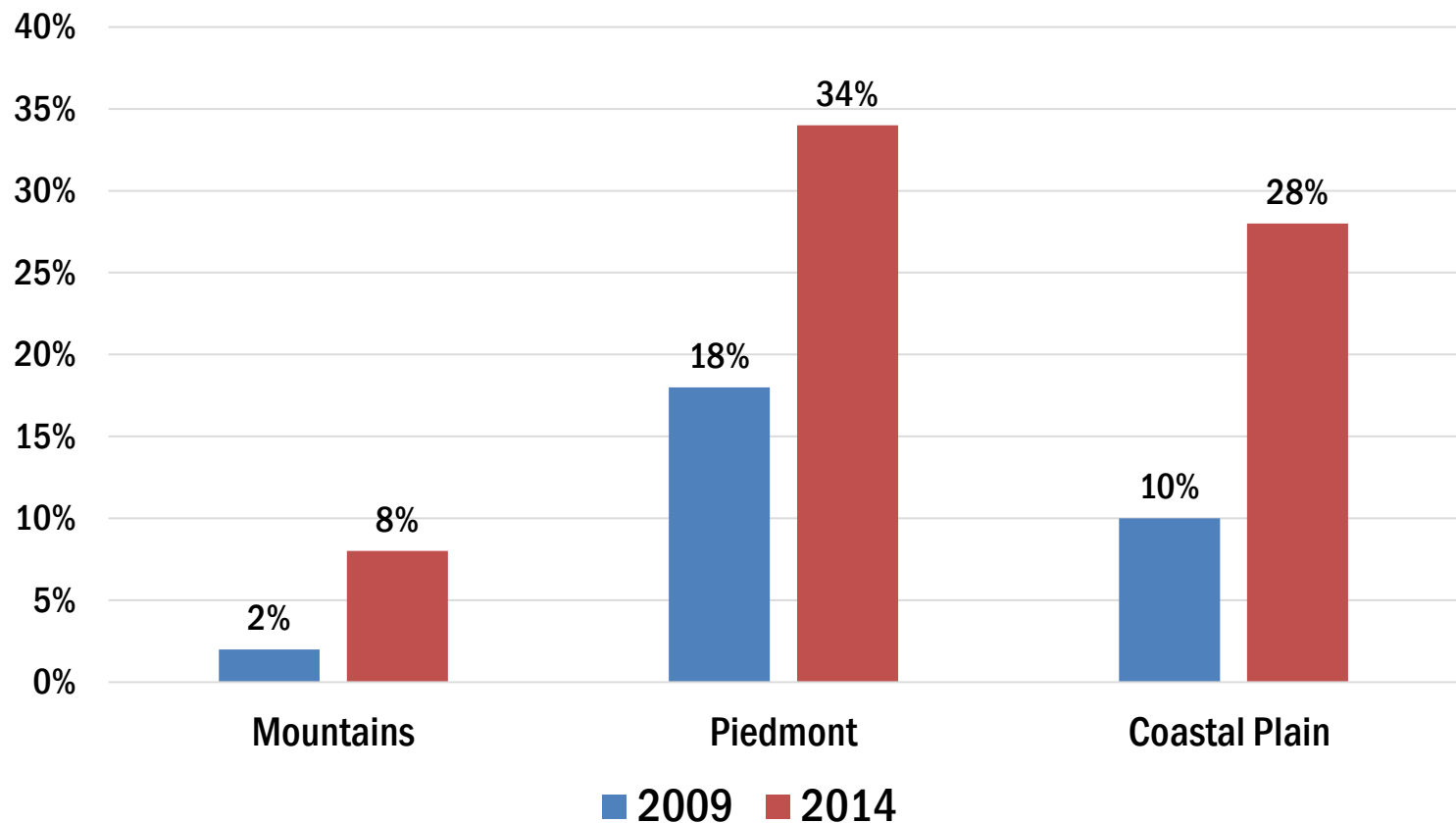
If YES, what % do contractors haul? (*Circle One*)
1-25% 26-50% 51-75% 75-99% 100%



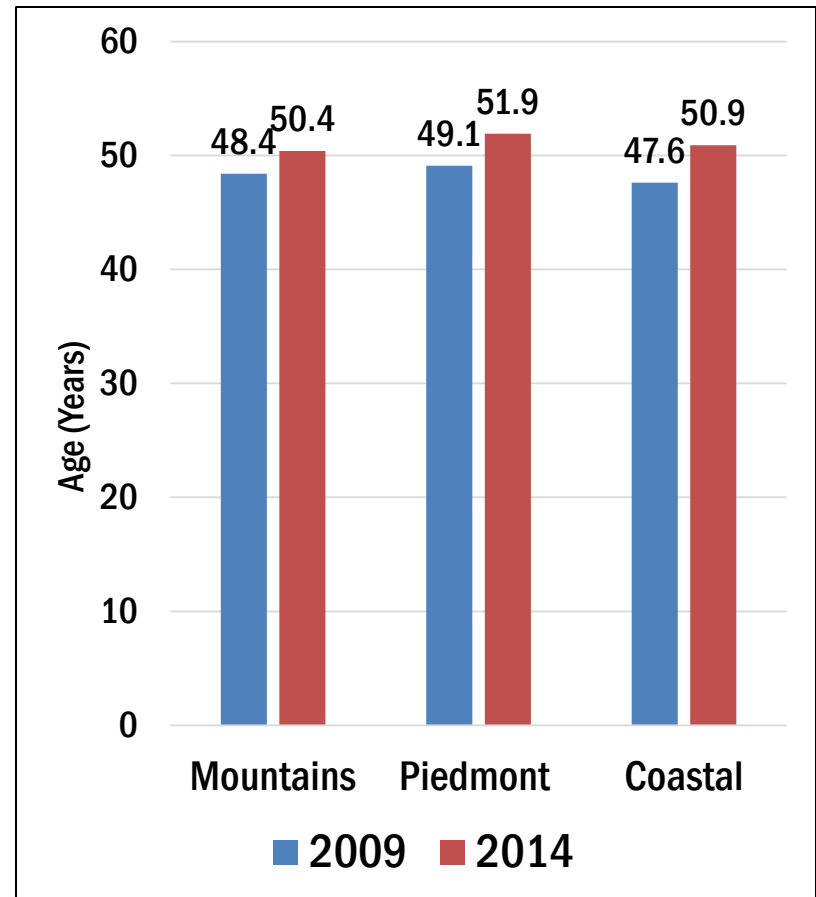
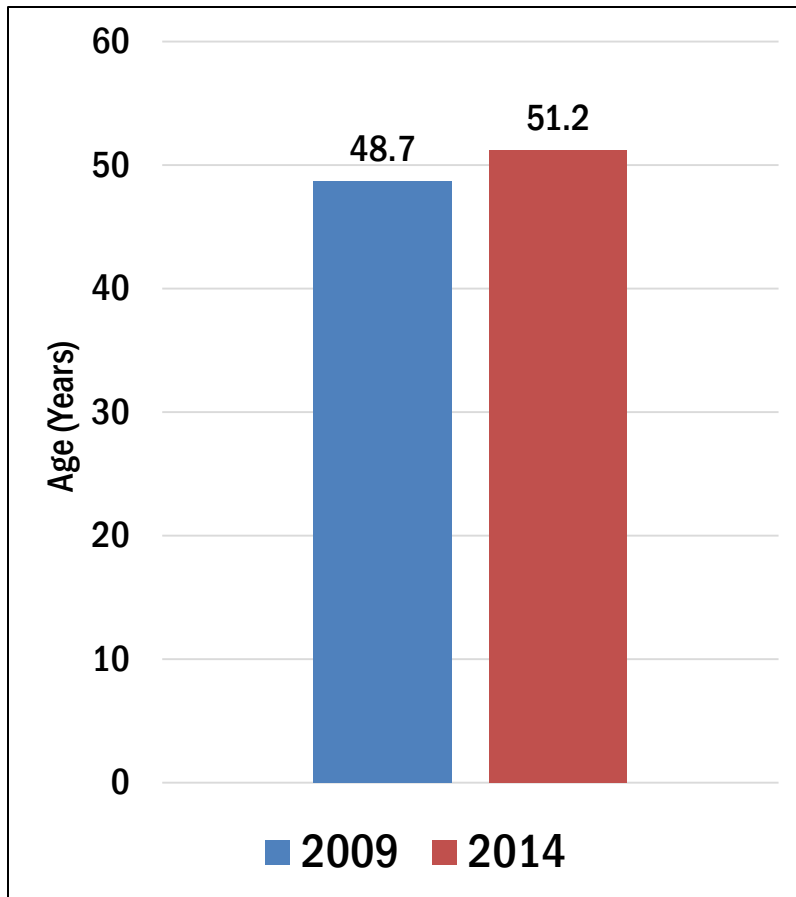
Do you currently have markets for biomass (fuel chips) in your area?



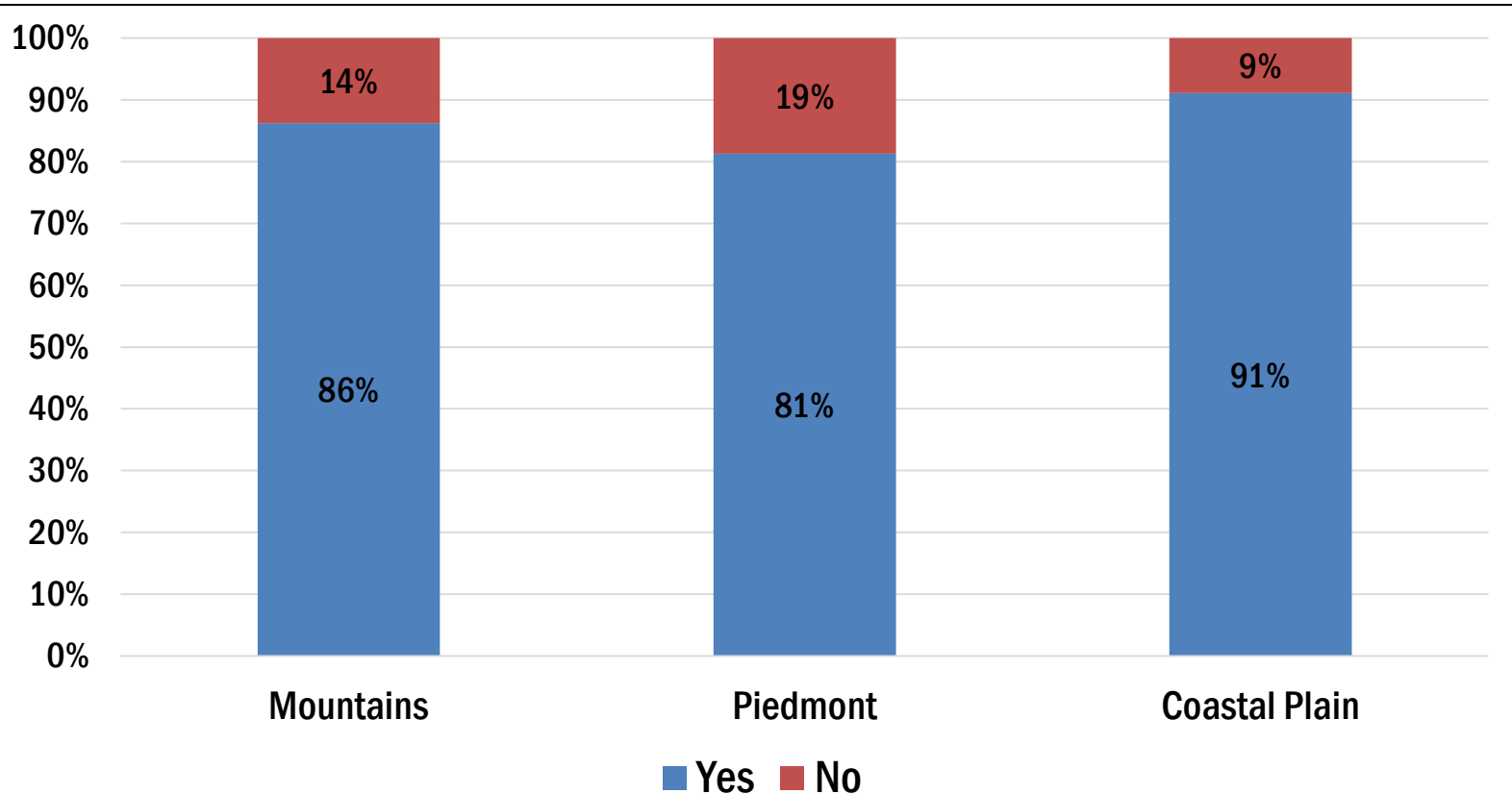
Do you currently harvest fuel chips?



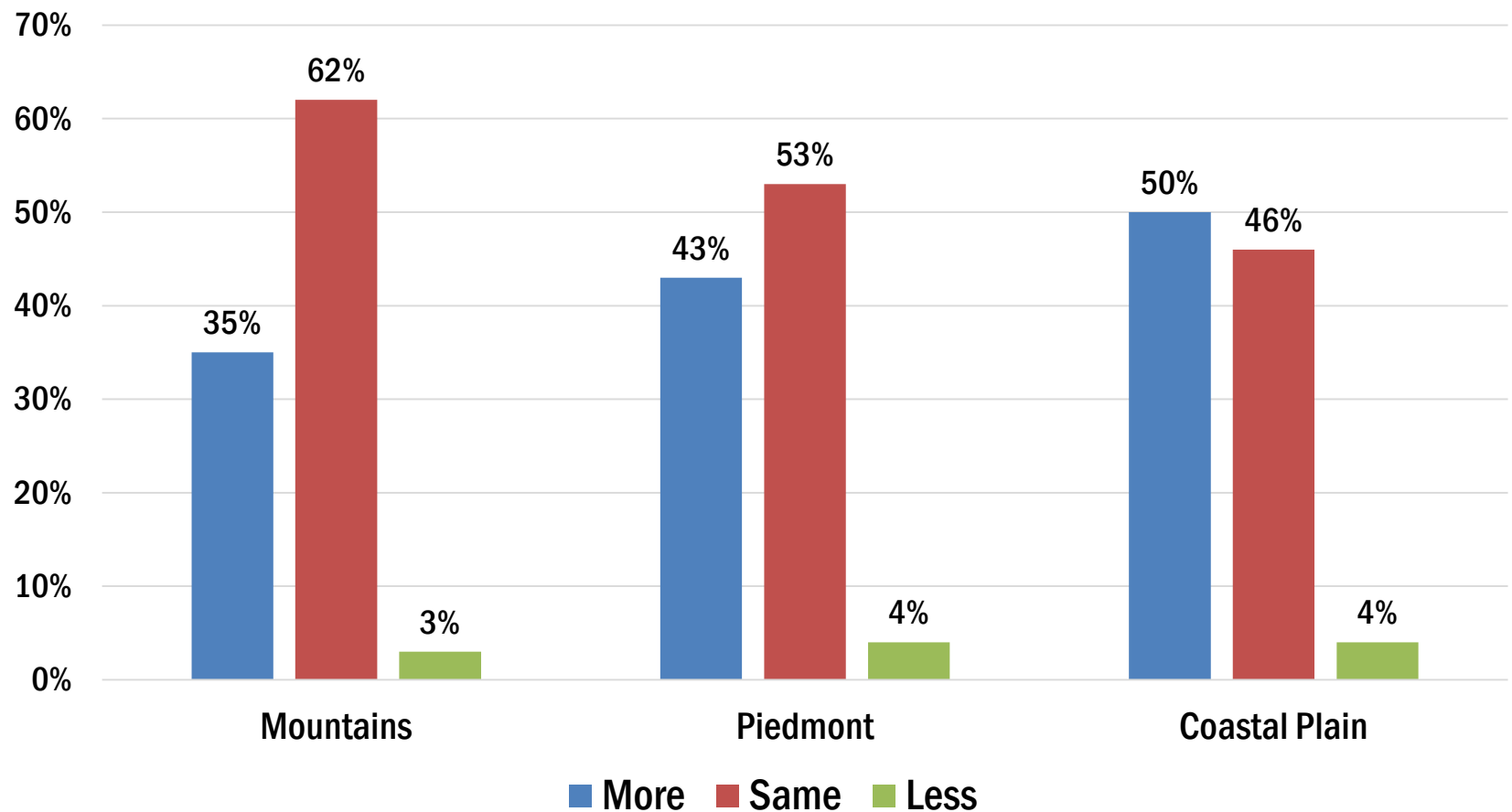
Average Business Owner Age



Do you expect to be operating your logging business in 5 years?



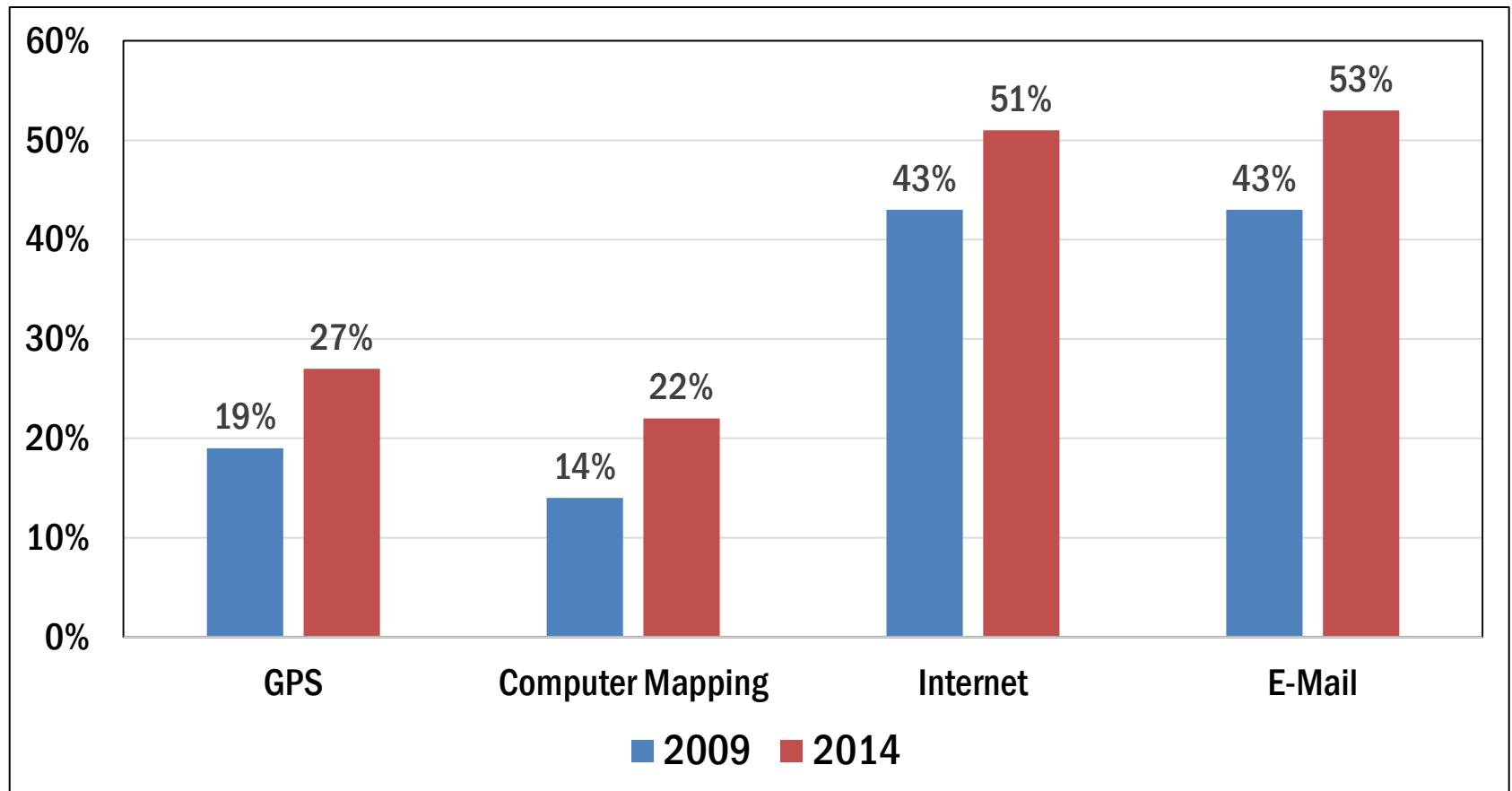
If you plan on being in operation in 5 years, do you expect your production to be more, about the same, or less?



Does your company use any of the following technologies? (Circle ALL that apply)

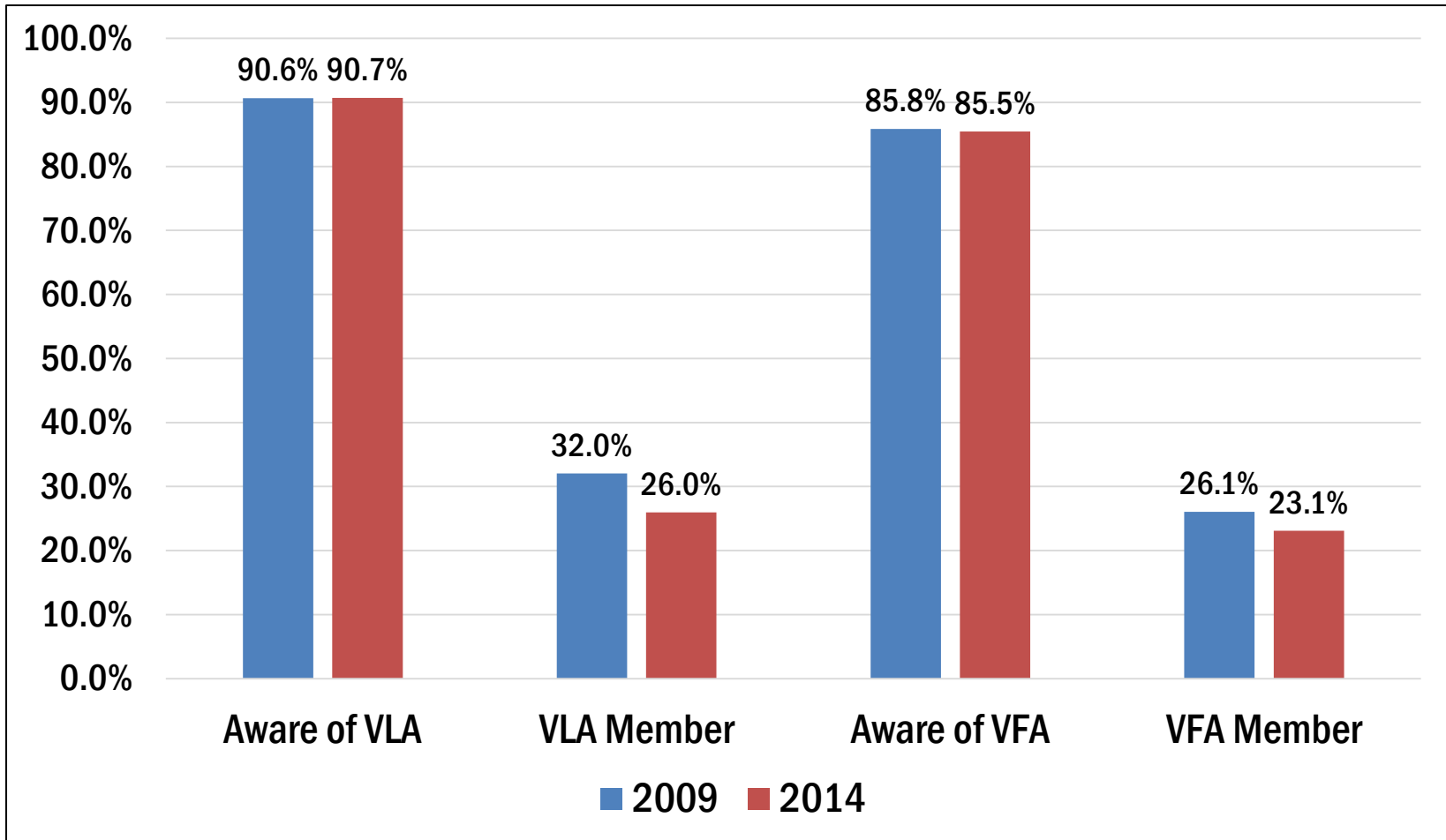
Global Positioning System (GPS)
Internet

Computer mapping
E-mail



Virginia Loggers Association

Awareness of Associations



How do you get information on current events or legislative issues facing the logging industry?(Circle ALL that apply)

Trade Magazine (Southern Logging Times, etc.)

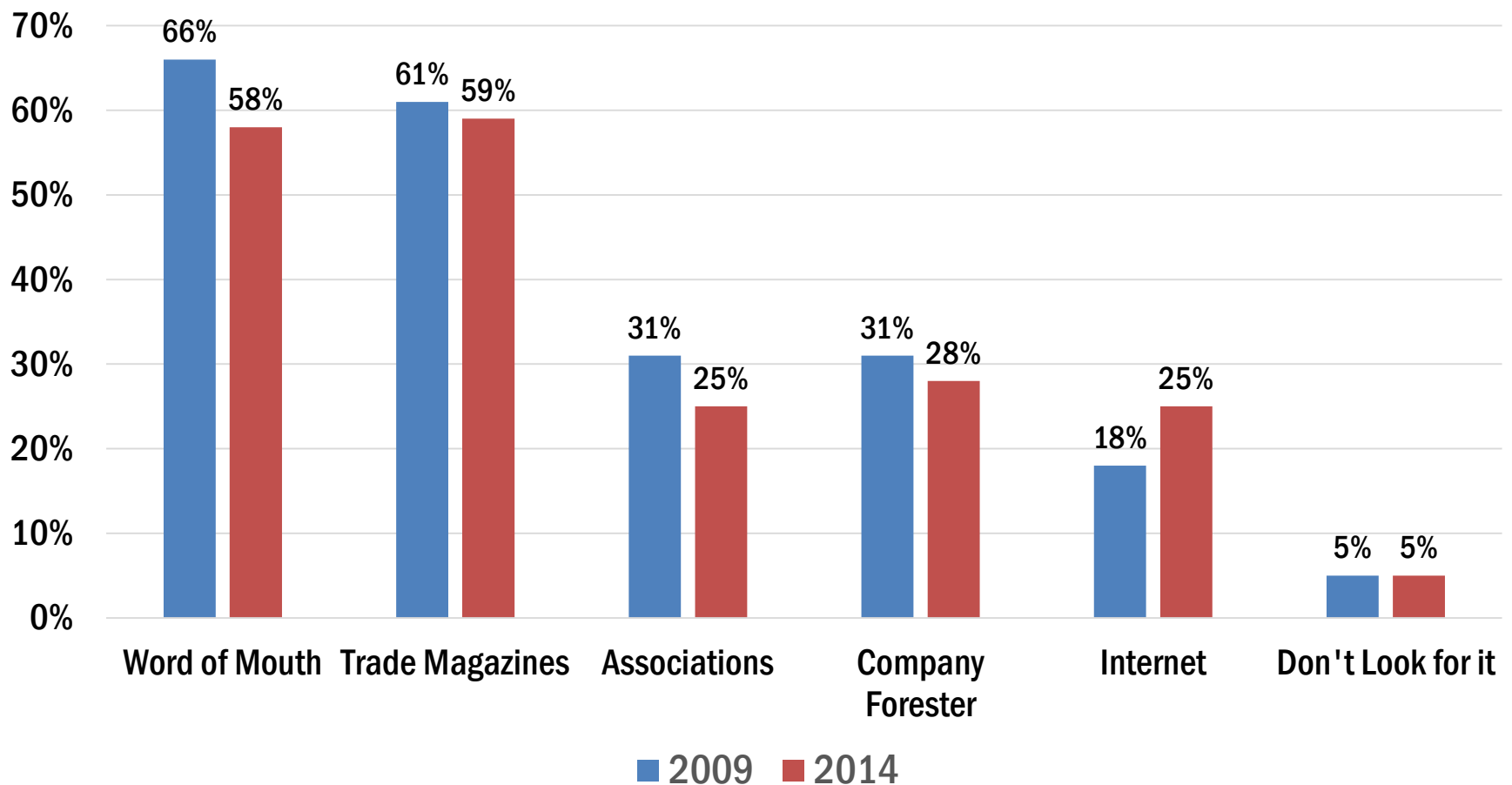
Associations (ALC, VLA, VFA, VFPA)

Word of mouth

Internet

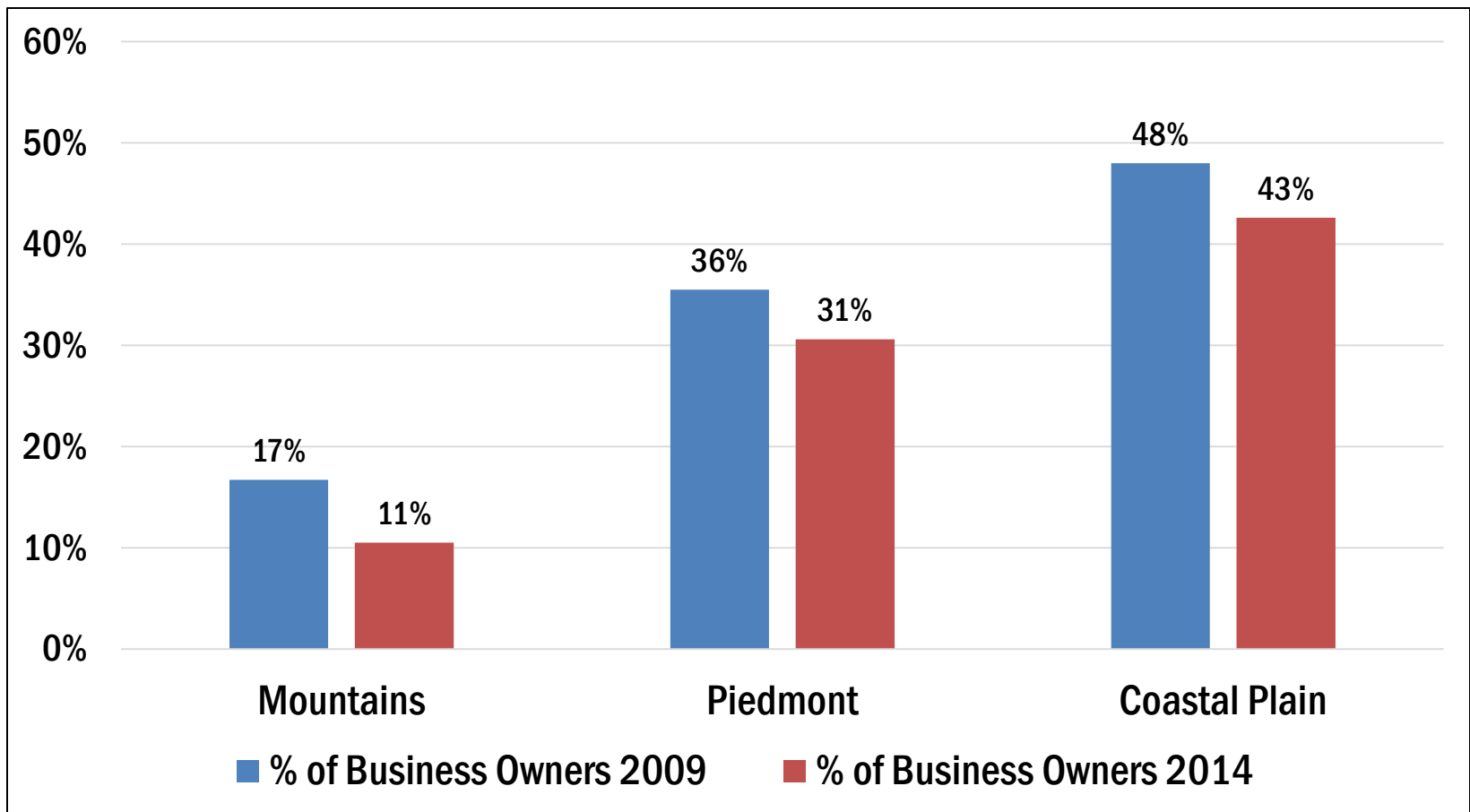
Company Forester

Don't look for it





Percent of Logging Business Owners Indicating VLA Membership



What do VLA Members look like compared to the rest of the Loggers?

	Non-Members	VLA Members
Crews Per Business	1.1	1.5
Loads Per Crew	18	39
Tons / Week / Business	503	1736
Est. Value of Logging Equipment	\$293,793	\$907,566

What do VLA Members look like compared to the rest of the Loggers?

Does your company use any of the following technologies?

(Circle **ALL that apply**)

Global Positioning System (GPS) Computer mapping
Internet E-mail

	Non-members	VLA Members
GPS	21%	42%
Internet	47%	63%
E-mail	49%	66%
Computer mapping	18%	34%

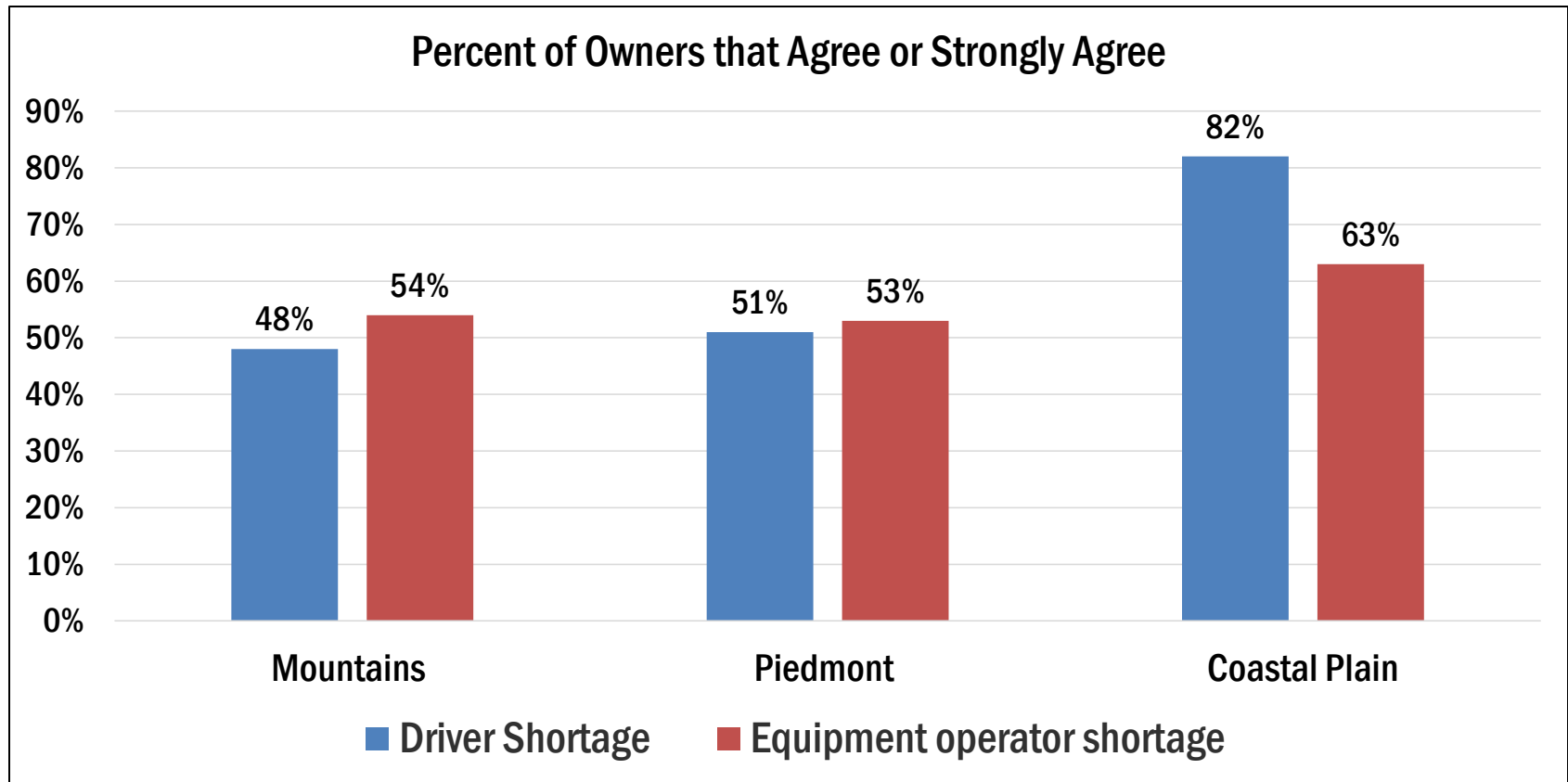
Logging Business Owner Attitudes

- We included a section in the questionnaire to measure owners' attitudes on issues and topics that we often hear as concerns or issues related to logging operations.
- Owners were provided a statement and then asked to rank their level of agreement with the statements using the following scale:

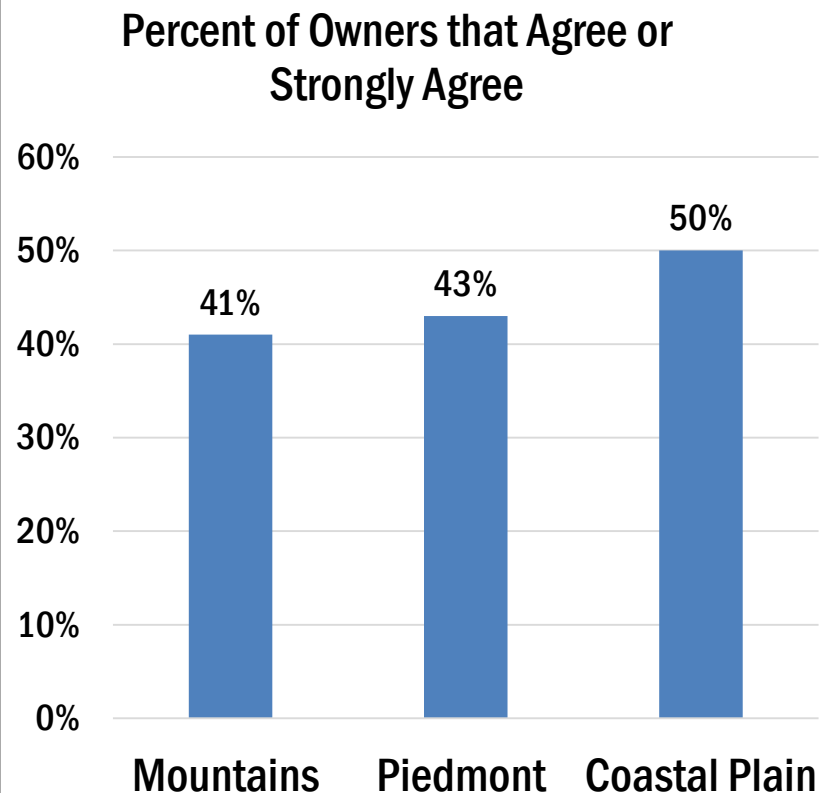
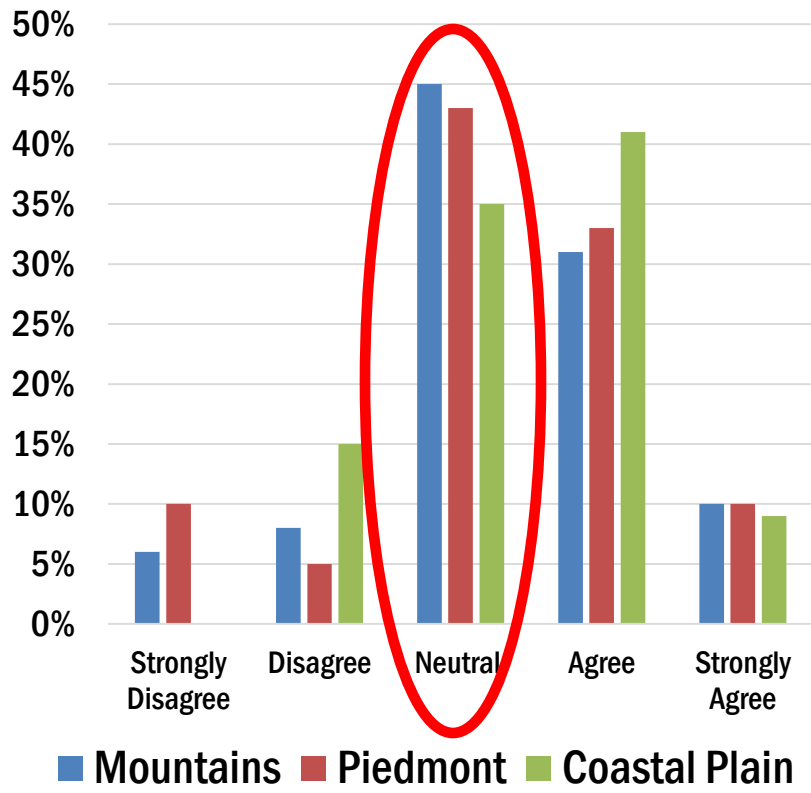
strongly disagree – disagree – neutral - agree - strongly agree

There is a shortage of qualified truck drivers / trucking contractors needed to transport wood from my operation.

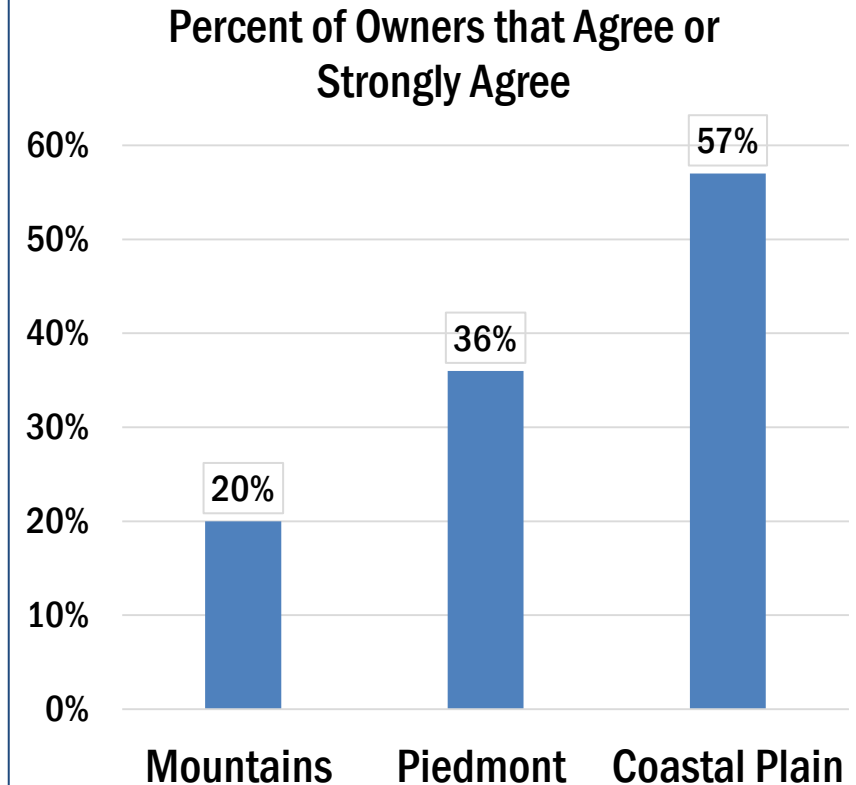
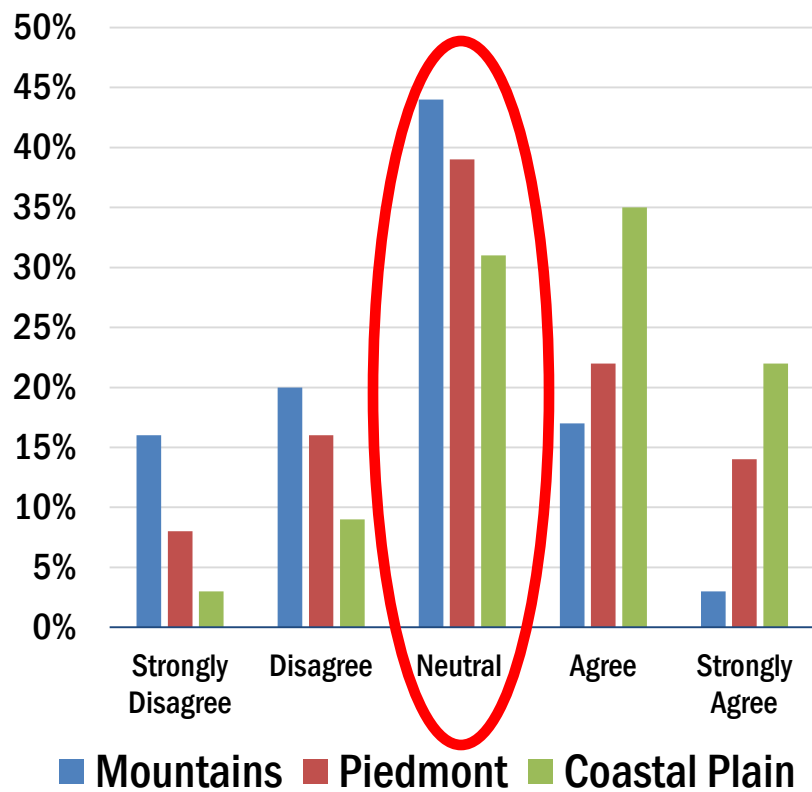
There is a shortage of qualified logging equipment operators needed to run equipment on my logging operation.



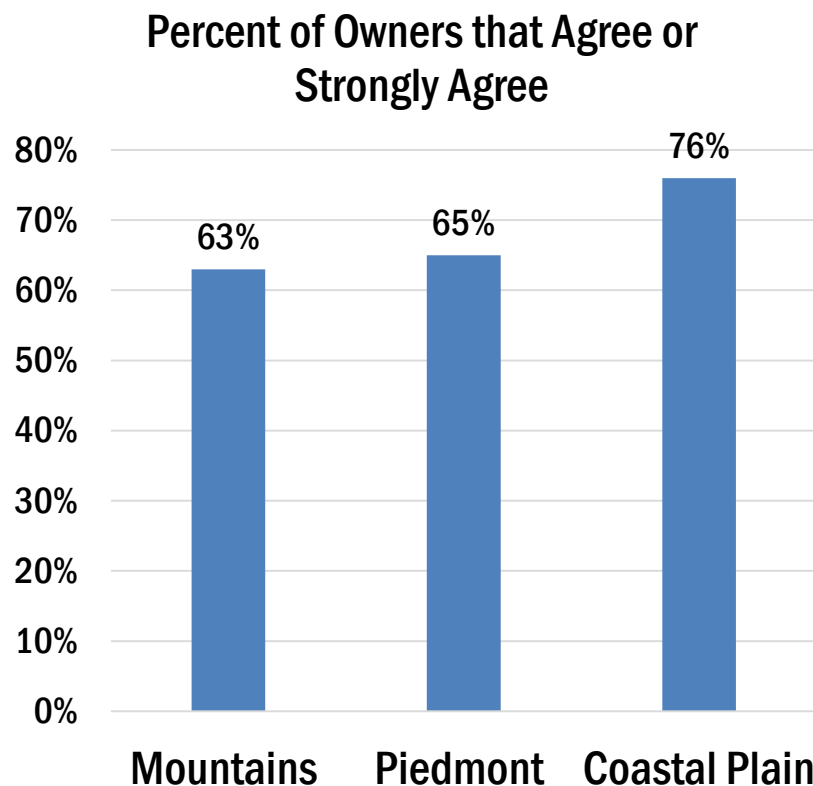
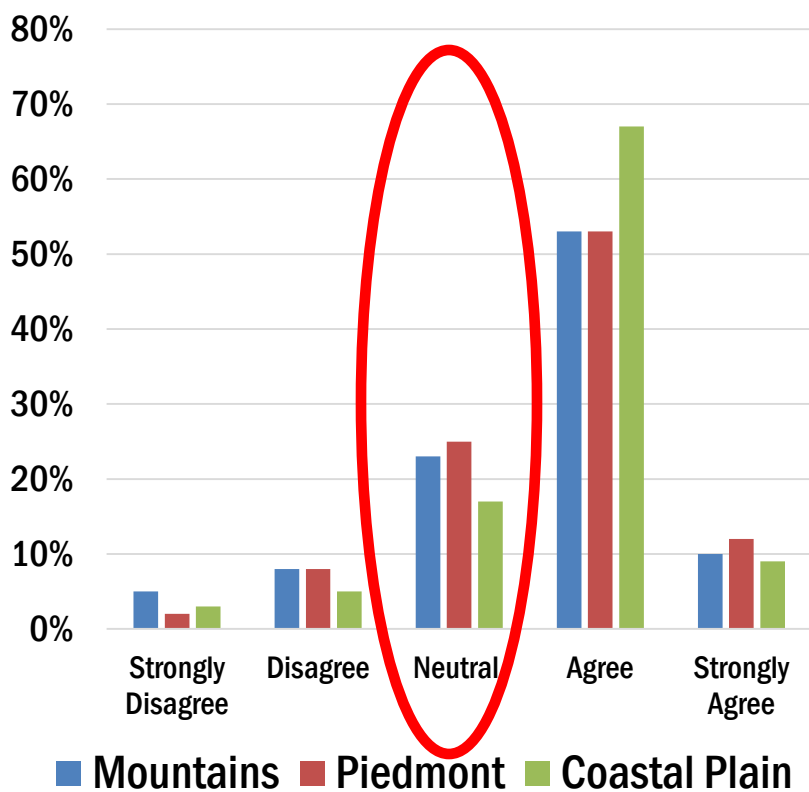
I am confident that new biomass markets will provide stable long term markets for wood.



Biomass markets have benefitted my business.



The outlook is positive for the logging industry in VA



Virginia's Logging Businesses

- **Average production rates generally increased from 2009-2014**
- **Many logging businesses in Virginia appear to be getting larger and more productive, especially in the Piedmont and Coastal Plain**
- **Many operations have responded to changing markets by adding chippers to utilize logging residues for energy**
- **Most plan to either stay the same or increase production over the next 5 years**
- **Fewer operations that expect to decrease production**

Virginia's Logging Businesses

- **There are always challenges**
- **Average age of owners is increasing**
- **Finding drivers and equipment operators is a challenge for many**
- **Outlook is positive among most business owners**
- **With strong markets, logging businesses will continue to find ways to succeed and produce the products needed for the future**



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