Economic Contribution of the Texas Forest Sector, 2024

Texas A&M Forest Service

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HIGHLIGHTS 2024

- The Texas forest sector directly contributed $27.4 billion in industry output and employed over 73,000 people with a payroll of $5.4 billion.
- Including direct, indirect, and induced effects, the Texas forest sector had a total economic contribution of $54.2 billion in industry output and supported more than 187,000 jobs with $13.0 billion in labor income.
- On average, every dollar generated in the Texas forest sector contributed an additional $0.98 to the rest of the state economy.
- Every job created in the forest sector resulted in another 1.57 jobs in the state.
- Secondary forest products manufacturing industries contributed over two-thirds of the Texas forest sector's total industry output and employed 67 percent of the forest sector workforce.
- The forest sector in East Texas directly produced $9.5 billion in industry output and supported more than 23,000 jobs with $1.8 billion in labor income.
- Eighty-one percent of the industry output from forestry, logging, and primary solid wood products industries was from East Texas.
- Texas exported $2.1 billion worth of forest products to foreign countries.
- Compared to 2021, the 2024 Texas forest sector's total industry output and employment increased by 30 percent and 9 percent, respectively.

INTRODUCTION

Texas has more than 55.9 million acres of forestland - 11.7 million acres in East Texas and 44.2 million acres across the rest of the state. Of the total forestland, timberland accounts for 23 percent, or about 12.9 million acres, and the majority of it - around 89 percent - is located in East Texas (USDA Forest Service, 2025). Figure 1 shows forest cover across the state.

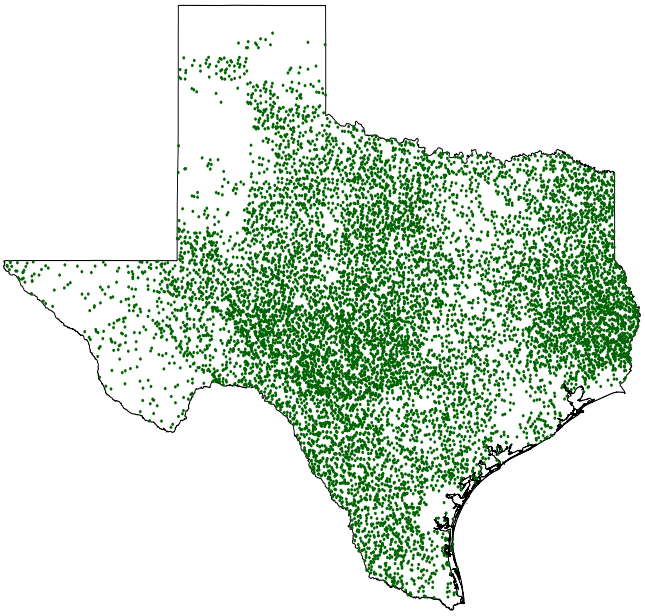

Figure 1. Forestland in Texas

In East Texas, about 91 percent of the timberland is privately owned, including land held by corporations, trusts, individuals, and tribes. Seven percent is under federal ownership and the remaining 2 percent is owned by state and local government. There is an estimated 21.7 billion cubic feet of volume on timberland in East Texas. Softwood species account for 63 percent and hardwoods account for 37 percent of the total (USDA Forest Service, 2025).

Only 1.4 million of the 44.2 million acres (3 percent) of forestland outside of East Texas is considered productive timberland which by definition, has the capacity of producing at least 20 cubic feet per acre per year. Mesquite is the most abundant forest type in Central and West Texas. Juniper-pine, oak, and other hardwood forest types are also abundant. Oak is a common type in the West Central and North Central regions. Timber growing stock outside of East Texas was estimated to be 513.5 million cubic feet, predominantly in hardwoods which make up 74 percent of the total. Only 26 percent is from softwoods (USDA Forest Service, 2025).

In 2023, total removals of growing stock in East Texas, including pine and hardwood, decreased 4 percent from the previous year. The total volume of growing stock removed was 580.0 million cubic feet, compared to 605.8 million cubic feet a year earlier. Industrial roundwood harvest in Texas, the portion of the total removals that were subsequently utilized in the manufacturing of wood products, totaled 553.5 and 37.7 million cubic feet for pine and hardwood, respectively. Pine industrial roundwood harvest was down 4 percent, and hardwood roundwood harvest was down 13 percent from a year earlier. The combined harvest decreased 5 percent to 591.2 million cubic feet (Zhang et al., 2025a).

Texas's forest sector plays a pivotal role in supporting local and regional economies, standing as the largest among the 13 southern states in terms of total employment, labor income, and gross domestic product (Zhang et al., 2025b). In 2024, wood-based industries continued to be one of the top ten manufacturing sectors in the state. The value of harvested timber ranked ninth among Texas's top agricultural commodities behind cattle and calves, milk, broilers, cotton lint, miscellaneous crops, chicken eggs, corn, and hay. Given the sector's importance, it is essential to understand its contribution to the state's economy. This study evaluates the Texas forest sector's economic contribution to local economies in 2024, its role in foreign exports, and the sector's contribution trends from 2009 to 2024. The contributions are further divided to capture variations across sub-industries and regions.

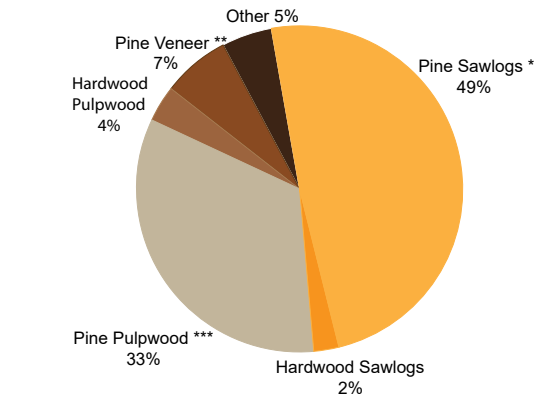

Figure 2. Industrial roundwood harvest by product, 2023

DATA AND METHODS

Impact Analysis for Planning (IMPLAN) is an economic simulation tool that utilizes regional datasets and constructs an input-output model, which illustrates the interdependence among various sectors within an economy. The data used by IMPLAN is primarily sourced from the U.S. Bureau of Economic Analysis, the U.S. Department of Agriculture, the U.S. Bureau of Labor Statistics, and the U.S. Census Bureau (IMPLAN Group LLC 2025). This study used 2022 IMPLAN data and reported the results in 2024 dollars unless stated otherwise.

IMPLAN estimates how the direct effects of the sector's expenditure contributed to the indirect effects of the supporting sectors as well as induced effects of consumption by households. The direct, indirect, and induced effects are related to changes in employment, labor income, value added, and industrial output resulting from industry activities. In addition, the multiplier effect of the social accounting matrix (SAM) was evaluated by calculating the relationship between the different sectors to reflect industry impacts on the local economy. The SAM multiplier reflects additional jobs, labor income, value added, and output created by an industry for the local economy.

Economic contribution analysis is used to estimate the contribution that Texas forestry-based sectors have on the state's overall economy. Specifically, the contribution analysis estimates the reduction in economic activity that would occur in a particular region if the forestry sector ceased to exist. The Texas forest sector is divided into six sub-industries: forestry; logging; primary solid wood products; secondary solid wood products; primary paper and paperboard products; and secondary paper and paperboard products. Each sub-industry includes several IMPLAN sectors as defined by Minnesota IMPLAN Group (see Appendix). Consistent with previous studies, IMPLAN sector 141 "Manufactured home (mobile home)" is excluded from the secondary solid wood products sub-industry. IMPLAN export data for 2024 has been adjusted to align with export figures from the U.S. Census Bureau. This update reflects a change in methodology and is not directly comparable to the export data presented in previous Economic Contribution reports. All results are based on multi-industry contribution analysis.

RESULTS

STATEWIDE CONTRIBUTIONS

The Texas forest sector directly contributed $27.4 billion in industry output in 2024 (Table 1). Value added accounted for 30 percent ($8.1 billion) of the industry output. Note that value added equals industrial output minus intermediate inputs. It is the contribution of industries to the state's output, also known as Gross State Product (GSP). GSP is the total market value of all goods and services produced within a state during a specific period, usually a year. Direct employment of the Texas forest sector was more than 73,000 workers with $5.4 billion in wages, salaries, and benefits. The sector's average annual labor income (including wages, benefits, taxes paid on behalf of employees, and proprietor income) was $74,013 in 2024, four percent higher than the state average across all sectors.

The impacts of the forest sector are transferred to other sectors of the economy through purchasing inputs from other sectors in the state as well as household spending with subsequent rounds of additional spending. Including direct, indirect and induced effects, the Texas forest sector contributed $54.2 billion in industry output and employed over 187,000 jobs with a payroll of $13.0 billion. The value added was $21.6 billion, or 40 percent of the total industry output. The SAM multipliers for industry output, value added, employment, and labor income are also presented in Table 1. On average, every dollar generated by the Texas forest sector contributed an additional $0.98 to the rest of the state's economy. Furthermore, every job created in the sector resulted in another 1.57 jobs across the state.

CONTRIBUTIONS BY SUB-INDUSTRY

Economic contributions varied across sub-industries within the Texas forest sector. The secondary solid wood products was the largest sub-industry in terms of industry output, value added, employment, and labor income (Table 1). This sub-industry employed 38,262 workers, representing 52 percent of the forest sector workforce. The second-largest sub-industry was secondary paper and paperboard products, which employed 15,948 workers, or 22 percent of the direct employment of the forest sector.

Primary wood products sub-industries (solid wood products and paper and paperboard products) produced 29 percent of the direct industry output and supported 11,952 full and part-time jobs in Texas. The forestry and logging sub-industries together accounted for about two percent of the total industry output. Figure 3 shows the direct economic contribution of the forest sector by sub-industry. The size of the bubbles represents the magnitude of industry output.

The primary solid wood products sub-industry has the highest SAM multipliers for value added and labor income, indicating local economies benefited slightly more from this sub-industry than others. Every dollar generated by this sub-industry created an additional $2.28 in payrolls and $2.30 in value added within Texas's economy.

CONTRIBUTIONS BY REGION

The economic contributions of the forest sector varied substantially across the state's seven regions: Northeast, Southeast, North Central, Northwest, South, West, and West Central. Table 2 shows the direct and total economic contributions of the Texas forest sector by region. In absolute terms, North Central Texas

Table 1. Direct and total economic contribution of the Texas forest sector by sub-industry, 2024

Sub-industry	Industry Output (million $)	Value Added (million $)	Employment (jobs)	Labor Income (million $)
Direct Contribution				
Forestry	198.46	141.88	2,399	89.10
Logging	398.20	218.04	4,534	183.74
Primary Solid Wood Products	4,563.34	1,088.39	8,225	624.94
Secondary Solid Wood Products	9,613.08	3,255.19	38,262	2,545.15
Primary Paper & Paperboard Products	3,423.89	943.81	3,727	486.38
Secondary Paper & Paperboard Products	9,167.83	2,451.49	15,948	1,480.76
Total	**27,364.80**	**8,098.80**	**73,096**	**5,410.06**
Total Contribution				
Forestry	375.17	245.68	3,716	154.87
Logging	863.71	491.95	8,394	356.34
Primary Solid Wood Products	9,584.17	3,587.61	30,776	2,051.87
Secondary Solid Wood Products	19,225.00	8,092.14	79,329	5,284.88
Primary Paper & Paperboard Products	7,121.59	2,804.91	18,335	1,501.07
Secondary Paper & Paperboard Products	17,024.61	6,404.29	46,987	3,649.07
Total	**54,194.24**	**21,626.59**	**187,537**	**12,998.10**
SAM Multiplier				
Forestry	1.89	1.73	1.55	1.74
Logging	2.17	2.26	1.85	1.94
Primary Solid Wood Products	2.10	3.30	3.74	3.28
Secondary Solid Wood Products	2.00	2.49	2.07	2.08
Primary Paper & Paperboard Products	2.08	2.97	4.92	3.09
Secondary Paper & Paperboard Products	1.86	2.61	2.95	2.46
Total	**1.98**	**2.67**	**2.57**	**2.40**

Economic contribution is based on multi-industry analysis of 2022 IMPLAN data and is reported in 2024 dollars. Numbers in columns may not sum to totals due to rounding.

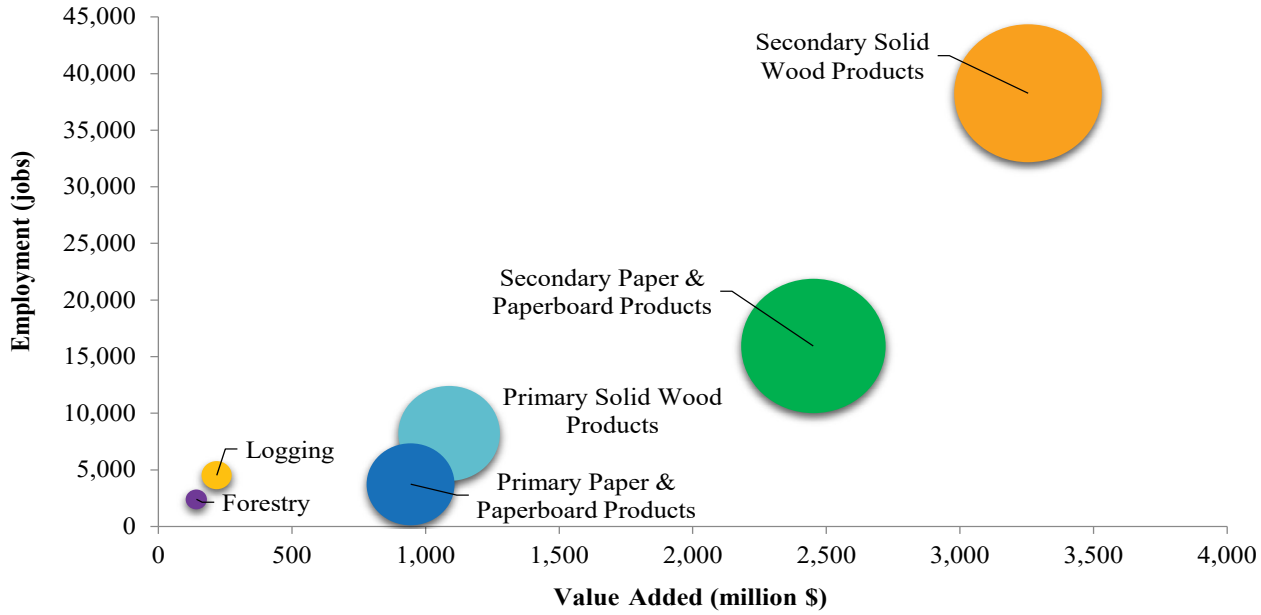

Figure 3. Direct economic contribution of the Texas forest sector by sub-industry, 2024

had the largest direct economic contribution in 2024. The forest sector in this region contributed 40 percent - $11.0 billion - of the overall direct industry output and employed 39 percent of workers - 28,807 people. This is mainly due to the concentration of secondary forest products and primary paperboard firms in this region. Including direct, indirect and induced effects, the forest sector in this region had a total contribution of approximately $22.8 billion in industry output, $9.4 billion in value added, and employed over 76,500 people.

The East Texas region had about 35 percent of direct industry output ($9.5 billion) and employed 32 percent (23,490 jobs) of overall direct workers in the sector, mainly from the solid wood products and paper and paperboard products industries in the region. Nearly three-quarters of all forestry and logging industries and the great majority of the primary forest products industries in Texas reside in East Texas. The output from the primary solid wood products in East Texas accounted for 85 percent of all primary solid wood products manufacturing in Texas. The forest sector in East Texas had a total economic contribution of $19.0 billion in industry output, $7.5 billion in value added, and over 64,600 jobs.

West Central Texas directly produced $4.5 billion in industry output from the forest sector in 2024. The region's share of the total Texas forest sector's industry output and employment was around 16 percent. Most of the outputs in this region were from the secondary forest products industries. The remaining three regions (Northwest, South, and West) played relatively minor roles in the Texas forest sector.

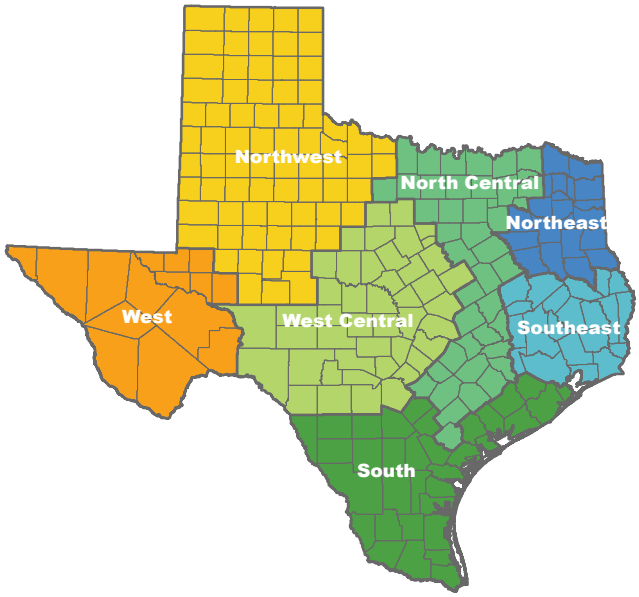

Figure 4. Regions in Texas

The forest sector plays an important role in the local economies of many East Texas Counties. For example, in 33 of 43 East Texas counties, the wood-based sector was among the top five manufacturing employers in 2024. The forest sector ranked first among manufacturing industries in Cass, Cherokee, Hardin, Harrison, Jasper, Marion, Newton, Polk, Sabine, San Augustine, Tyler, and Walker counties. The forest sector contributed more than 10 percent of total employment gener-

ated in Cass, Jasper, Polk, and Sabine counties. The forest sector contributed more than 25 percent of direct economic output generated in Cass, Jasper, Polk, and Sabine counties. Similarly, the sector contributed more than 15 percent of total value added in Cass, Jasper, Marion, Polk, and Sabine counties.

Harris, Polk, Jasper, Cass, and Harrison were the top five East Texas counties in terms of direct output value of the forest sector in 2024. Similarly, the top five counties with direct forest-related employment were Harris, Polk, Harrison, Angelina, and Cass. Harris, Polk, Harrison, Jasper, and Cass counties provided the five largest direct labor income opportunities. In addition, Harris, Polk, Jasper, Cass, and Harrison ranked the top five among East Texas counties in terms of direct value added contribution.

Table 2. Direct and total economic contribution of the Texas forest sector by region, 2024

Region	Industry Output (million $)	Value Added (million $)	Employment (jobs)	Labor Income (million $)
Direct Contribution				
Northeast	2,853.81	800.34	7,924	523.53
Southeast	6,598.31	1,986.86	15,566	1,291.16
North Central	11,019.63	3,332.75	28,807	2,249.99
Northwest	662.03	210.52	2,298	146.84
South	1,092.55	327.81	4,306	239.72
West	681.24	145.02	1,644	99.86
West Central	4,457.22	1,295.50	12,551	858.96
Total	**27,364.80**	**8,098.80**	**73,096**	**5,410.06**
Total Contribution				
Northeast	5,346.14	1,940.57	20,243	1,166.74
Southeast	13,635.58	5,598.32	44,366	3,335.47
North Central	22,765.64	9,367.85	76,575	5,625.51
Northwest	1,083.63	418.73	4,264	262.39
South	1,773.40	639.50	8,152	416.23
West	1,153.58	355.16	3,741	211.27
West Central	8,436.26	3,306.46	30,196	1,980.47
Total	**54,194.24**	**21,626.59**	**187,537**	**12,998.10**
SAM Multiplier				
Northeast	1.87	2.42	2.55	2.23
Southeast	2.07	2.82	2.85	2.58
North Central	2.07	2.81	2.66	2.50
Northwest	1.64	1.99	1.86	1.79
South	1.62	1.95	1.89	1.74
West	1.69	2.45	2.28	2.12
West Central	1.89	2.55	2.41	2.31
Total	**1.98**	**2.67**	**2.57**	**2.40**

Economic contribution is based on multi-industry analysis of 2022 IMPLAN data and is reported in 2024 dollars. Numbers in columns may not sum to totals due to rounding.

FOREIGN EXPORTS OF THE TEXAS FOREST SECTOR

Texas exported $2.1 billion worth of forest products to foreign countries in 2024, about eight percent of the forest sector's value of direct industry output. Primary paper and paperboard was the largest forest products export industry, shipping $822.5 million worth of products (Figure 5). The value of foreign exports by the secondary paper and paperboard products industry totaled $625.3 million. The secondary and primary solid wood products exported $377.4 million and $217.8 million, respectively.

East Texas, which includes Northeast and Southeast regions, was the largest contributor to exports, accounting for 40 percent of the total value of Texas forest products foreign exports in 2024 (Figure 6). North Central Texas region was the second largest, exporting $807.8 million worth of forest products internationally. These two regions accounted for 79 percent of the total forest products exports from the state. West Central Texas was a distant third, accounting for 14 percent. The remaining three regions contributed 7 percent of the total forest products exports, or $152.7 million.

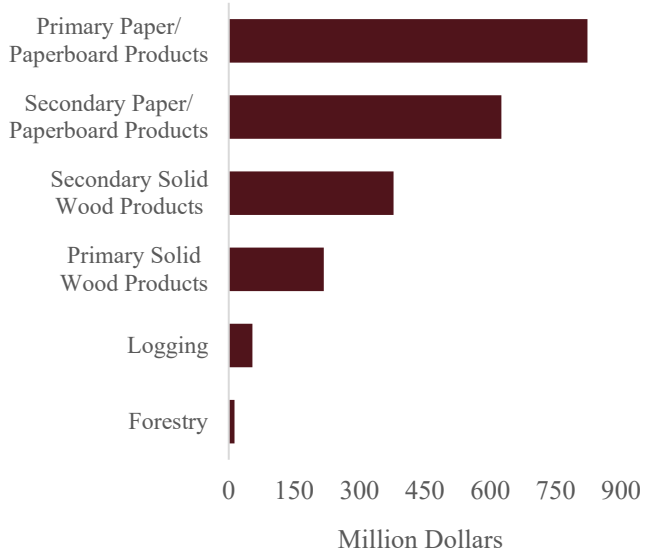

Figure 5. Value of Texas forest products foreign exports by sub-industry, 2024

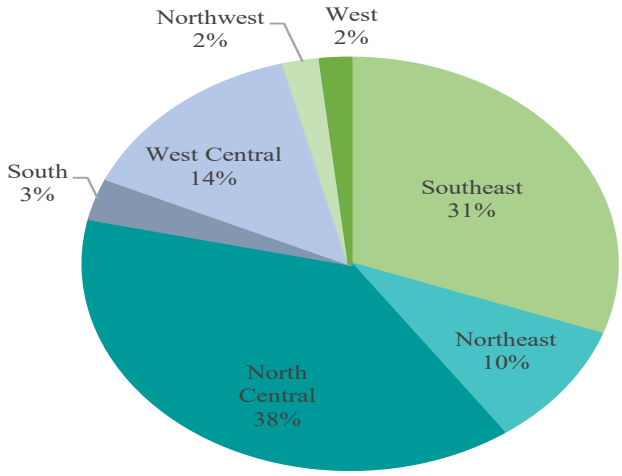

Figure 6. Value of Texas forest products foreign exports by region, 2024

ECONOMIC CONTRIBUTION TRENDS OF THE TEXAS FOREST SECTOR

Along with economic contribution, understanding the economic contribution trend is also crucial as it offers valuable insights into the evolving role of the forest sector in the economy over time. This section presents an overview of the forest sector's total economic contributions from 2009 to 2024. The total output and employment across six key forest sectors reflects a combination of stability and growth, with notable variations between the sectors.

Figure 7 shows the total industry output of the Texas forest sector from 2009 to 2024. During this period, industry output in the forestry and logging sectors declined annually by 4 percent and 3 percent, respectively. Both primary and secondary solid wood products saw moderate annual output growth of 13 percent and 4 percent, respectively.

The primary and secondary paper and paperboard products showed modest annual output growth of 3 percent each over the past 15 years, reflecting a consistent upward trend. However, the secondary paper and paperboard products saw a more pronounced growth after 2021, likely due to the accelerated demand for packaging materials as e-commerce expanded during the pandemic response. Additionally, the increasing shift towards sustainable packaging solutions may have further fueled this surge in demand.

Figure 8 illustrates the total employment trends of the forest sector in Texas from 2009 to 2024. The

forestry sector saw fluctuation in employment over the period, with a noticeable decline in the early years, followed by a recovery and stabilization by 2024. In contrast, the logging sector demonstrated a consistent upward trend, showing annual growth of 2 percent, reflecting increased demand for logging services.

The primary solid wood products sector increased by 6 percent per year in employment. In contrast, the secondary solid wood products sector showed noticeable fluctuations in employment from year to year, but overall, there was no significant long-term growth or decline, with employment remaining roughly unchanged between 2009 and 2024. Secondary paper and paperboard products maintained a relatively consistent level over the years, whereas primary products showed some growth, peaking in 2022 before a slight decline in 2023.

From 2009 to 2024, the total annual output increased by 4 percent, while employment grew by 1 percent per year. This might be because of technological advancements in the forest sector, which have improved efficiency and productivity, reducing the need for proportional increases in jobs while boosting overall output.

In recent years, the Texas forest sector has experienced significant growth, with total industry output and employment increased by 30 percent and 9 percent in 2024, respectively, compared to 2021. This rise underscores the sector's recovery and growth, particularly following the challenges introduced during the pandemic response. The growth is also reflection of broader economic trends, including housing boom, rise in mass timber construction, and increasing use of biochar.

CONCLUSION

The Texas forest sector plays an important role in the state's economy. For more than a decade, the wood-based industry has remained one of the top 10 manufacturing sectors in the state. In 2024, the Texas forest sector (forestry, logging, primary and secondary solid wood products industries, and primary and secondary paper and paperboard products industries) directly contributed $27.4 billion in industry output and $8.1 billion in value added and supported more than 73,000 jobs with a payroll of $5.4 billion.

The total economic contribution of the Texas forest sector, including direct, indirect, and induced ef-

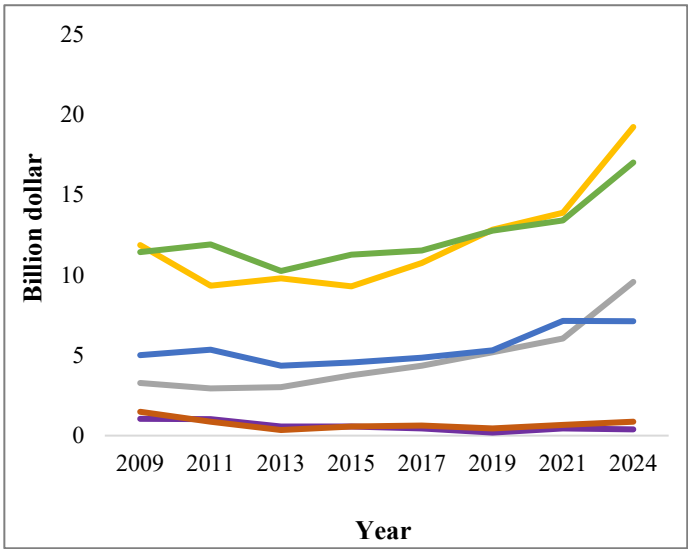

Figure 7. Total economic output of Texas forest sector by sub-industry, 2009-2024

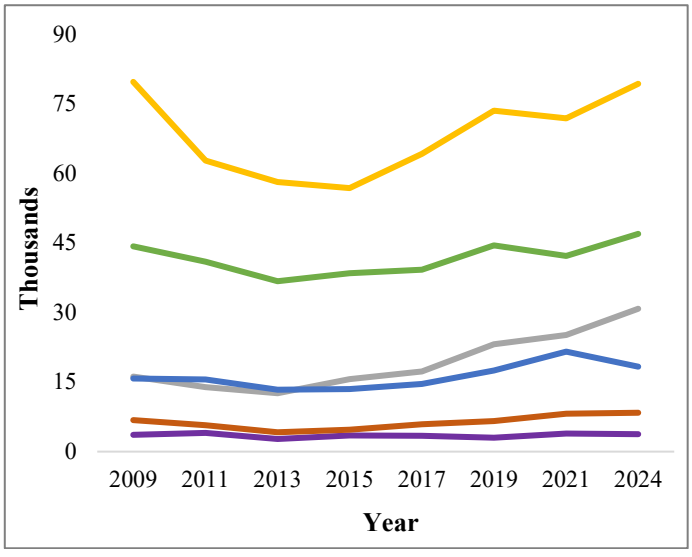

Figure 8. Total employment of Texas forest sector by sub-industry, 2009-2024

fects, were $54.2 billion in industry output, $21.6 billion in value added, $13.0 billion in labor income, and over 187,000 jobs. On average, every dollar generated by the Texas forest sector contributed an additional $0.98 in other sectors of the state. Every job created in the sector resulted in another 1.57 jobs in the state.

The largest industry output was from secondary forest products (e.g., wood windows, doors and mill work, wood containers, wood buildings, other wood products, furniture, paperboard container, coated and treated paper and packaging materials, etc.). Nearly three-quarters of all forestry and logging industries and the majority of the primary forest products industries in Texas reside in East Texas.

Among Texas's seven regions, North Central region made the largest economic contribution to the state's economy. Most of the secondary forest products manufacturing facilities are located in this region. The East Texas region ranked second, with the forest sector directly contributing $9.5 billion in industry output, $2.8 billion in value added, $1.8 billion in labor income, and supported over 23,000 jobs.

Texas forest products firms exported about eight percent of their direct industry output, or $2.1 billion worth of forest products to foreign countries in 2024. The primary paper and paperboard was the largest forest products export industry. The East Texas region was the largest contributor among all regions to forest products foreign exports.

The Texas forest sector demonstrated a dynamic trajectory from 2009 to 2024, marked by both resilience and growth. The forestry sector experienced a decline in both total industry output and employment. The logging sector saw a decrease in total output, while its employment levels increased. Solid wood products and paper and paperboard products saw moderate increases in both total output and employment, particularly following the pandemic response. The 30 percent increase in total industry output and 9 percent rise in employment since 2021 underscore the sector's growing economic importance.

Note that the scope of this study is focused only on the economic contribution of the forest sector. The environmental benefits of forests were not included. A study conducted by Texas A&M Forest Service in 2013 estimated that Texas's more than 60 million acres of forestland provide $93 billion worth of environmental goods and services such as regulating local climate, protecting water resources, improving wildlife habitats, species diversity and other non-material cultural benefits. There are some emerging, non-traditional markets for forestry and forest products such as electricity or biofuel production using woody biomass, carbon credits, and other ecosystem benefits from sustainable forest management. These markets also provide economic opportunities for the Texas forest sector.

Additional information on the economic contribution of Texas forest industries, statewide trend analysis, directory of forest products industry, timber supply analysis, county or region-specific distribution of forest products, economic values of the ecological goods and services provided by Texas forests, and more web-based applications are available in Texas Forest Information Portal (https://texasforestinfo.tamu.edu/) developed by Texas A&M Forest Service.

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GLOSSARY

Industry output is the total value of production or service by industry for a given time period.

Value added is the difference between an industry's total output and the cost of its intermediate inputs. It consists of four components: employee compensation, proprietor income, other property income, and indirect business tax.

Employment includes full-time and part-time employees and self-employed individuals.

Labor income includes wages, salary, and benefits of employees, taxes paid to the government on behalf of employees, and income for self-employed individuals.

Direct effects refer to the sector's own production, value added, employment, and labor income.

Indirect effects refer to the economic activities in other sectors supported by the forest sector's purchase of goods and services.

Induced effects are economic activities from consumption of goods and services using income generated from the direct and indirect effects.

SAM (Social Accounting Matrix) Multiplier refers to the overall effect of the forest sector on the regional economy from spending an extra dollar.

Direct economic contribution of a sector includes only direct effects.

Total economic contribution of a sector includes all three types of effects generated by the sector: direct, indirect, and induced.

APPENDIX

Sub-Industry/IMPLAN Sector	IMPLAN Index	2022 NAICS
Forestry		
Forestry, forest products, and timber tract production	15	1131-2
Commercial hunting and trapping	18 (partial)	1142 (partial)
Support activities for agriculture and forestry	19 (partial)	115 (partial)
Logging		
Commercial logging	16	113310
Primary Solid Wood Products		
Sawmills	132	321113
Wood preservation	133	321114
Veneer and plywood manufacturing	134	321211-2
Reconstituted wood product manufacturing	136	321219
Secondary Solid Wood Products		
Engineered wood member and truss manufacturing	135	321215
Wood windows and door manufacturing	137	321911
Cut stock, resawing lumber, and planing	138	321912
Other millwork, including flooring	139	321918
Wood container and pallet manufacturing	140	321920
Prefabricated wood building manufacturing	142	321992
All other miscellaneous wood product manufacturing	143	321999
Wood kitchen cabinet and countertop manufacturing	365	337110
Upholstered household furniture manufacturing	366	337121
Nonupholstered wood household furniture manufacturing	367	337122
Institutional furniture manufacturing	369	337127
Wood office furniture manufacturing	370	337211
Custom architectural woodwork and millwork	371	337212
Showcase, partition, shelving, and locker manufacturing	373	337215
Primary Paper and Paperboard Products		
Pulp mills	144	322110
Paper mills	145	322120
Paperboard mills	146	322130
Secondary Paper and Paperboard Products		
Paperboard container manufacturing	147	32221
Paper bag and coated and treated paper manufacturing	148	322220
Stationery product manufacturing	149	322230
Sanitary paper product manufacturing	150	322291
All other converted paper product manufacturing	151	322299

Source: IMPLAN Group, 2022


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