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Furniture Production and the  
Forest Resources of Southwest Mississippi

by

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INTRODUCTION

The furniture industry has become a dominant industry in Mississippi. Furniture producers employ over 22,000 people in the State and directly account for more than 10 percent of all manufacturing employment, up from just over 5 percent in 1963.

Mississippi's growth in employment, income, and value added due to furniture manufacturing has not been shared equally by all counties. The northeastern counties currently represent nearly 80 percent of all production and employment in the state's furniture industry, and, in general, the southwestern counties have not shared in the industry's phenomenal growth (Figure 1). Southwestern Mississippi counties may have significant potential for growth in this industry, however, particularly if such growth complements production in the northeastern part of the state.

This paper is a summary of some of the important issues related to the potential for increased employment and income from production of furniture in southwest Mississippi. The issues are primarily related to the industry's use of wood-based materials, and to the availability of such materials from timberlands in southwestern Mississippi counties.

WOOD-BASED MATERIALS FOR FURNITURE PRODUCTION

The U.S. furniture industry is most prominent in areas that are near major markets and that have significant inventories of standing timber. The furniture industry historically has located in areas of the U.S. with two important attributes--areas that are near major population centers, and that also have significant inventories of hardwood timber. The industry was prominent at Jamestown, New York, for example, and in Michigan, prior to gaining nationwide importance in North Carolina. Mississippi has also benefitted from geographic location; one of the most important reasons for the industry's recent growth in Mississippi has been the state's nearness to Atlanta, Dallas, and major markets and distribution points in the Mid-West. In addition, however, Mississippi and surrounding states are heavily forested, and are important producers of wood-based materials.

Wood materials are the most important input for non-upholstered furniture, and are exceeded only by the cost of fabric in upholstered furniture. A recent report by the USDA Forest Service shows that lumber, dimension stock, wood panels, and other wood-based materials comprise 56 percent of the cost of raw materials for producing non-upholstered household furniture. The upholstered furniture industry has become dominant in Mississippi, however, and wood-based materials are the second most costly input to production. A 1986 survey by the Mississippi R&D Center reported that the state's furniture industry uses \$150 million of wood-based materials each year (28 percent of the total cost of inputs), second only to \$170 million of fabric (32 percent of total purchases). The next most important input, foam and foam cushions, is a distant third at \$59 million (11 percent of total raw materials costs).

Hardwood timber products dominate the industry's use of wood-based materials. The furniture industry uses about 25 percent of all hardwood lumber in the U.S. each year--a percentage that has been nearly constant for 30 years. Nationwide, the non-upholstered industry's raw materials costs are about 18 percent hardwood lumber, 9 percent hardwood dimension, and 5 percent hardwood veneer (only 7 percent softwood lumber). For Mississippi, the R&D Center estimated that of the \$150 million in wood-based materials, \$74 million was for frames (primarily hardwood), and \$28 million was for oak lumber.

#### TIMBER RESOURCES AND DIMENSION STOCK PRODUCERS IN SOUTHWEST MISSISSIPPI

The USDA Forest Service has complete, detailed information on the state's timber resources. The USDA Forest Service maintains updated, detailed information on physical timber inventories for southern states at the Forestry Sciences Lab in Starkville. The most recent "Forest Survey" for Mississippi was completed in 1987, and results are now available in great detail (for specific regions of the state and for specific timber sizes, species, etc.). Table 1 contains some of the highlights from a recent report titled Forest Statistics for Southwest Mississippi Counties - 1987, by John Kelly and F. Dee Hines. A complete reference and an address to obtain more information are included in Table 2 (References and Sources of Related Information).

An important attribute for increased production of furniture is the region's preponderance of hardwood timber, and the fact that hardwood growth is currently twice the rate of harvest. Southwest Mississippi has many forest resource-related similarities to the state's northeastern counties. A high percentage of the timberland is in hardwood forest types, for example, and total hardwood volumes, including sawtimber sizes, are increasing each year. As noted in Table 1, item 5, however, caution must be taken in interpreting such numbers. Resource

availability involves more than physical inventory, and a serious appraisal of the region's resources would have to consider economic availability in terms of accessibility, and ownership attributes and attitudes.

In terms of the long-term future for furniture industry development, hardwood resources that are currently in relatively small diameter classes must also be considered. Although total hardwood volumes are increasing in southwest Mississippi, the number of live hardwood trees in relatively small diameter classes decreased between 1977 and 1987 (for all diameters below 16 inches except the 10-inch class). The total number of live hardwood trees decreased by 10 percent, and the number of "growing-stock" trees (live trees of commercial species) decreased by 46 percent. Most of the decrease in numbers of growing-stock trees was in diameter classes less than 5 inches. Hardwood pulpwood removals have significantly increased in recent years in all of the counties in the Southwest region (Figure 2).

Hardwood sawmills and dimension stock producers are relatively prominent in the region. Figures 3 and 4 illustrate the locations of hardwood dimension and flooring mills in the Southwest and North regions of the state, respectively. Although the North region has many more facilities in this industry, the southwest region has more such firms than most other areas of Mississippi or Alabama (Figure 5).

## DISCUSSION

The hardwood timber resources of Southwest Mississippi are probably under-utilized by furniture manufacturers at present. The region has many positive attributes for attracting domestic furniture company expansions, however, and may also have the potential to capitalize on Canadian expansions into the U.S. South. Canadian firms have already begun to restructure to meet expected increases in competition due to the recently approved free-trade agreement with the U.S. Economic development officials are aware, of course, that timber-related advantages are only one part of the necessary "package" of attributes which prospective companies will consider.

To be effective, information on the potential for location or expansion of this industry must include issues related to labor, markets, taxes, etc. Those interested in developing such a package should refer to the eight "major advantages" presented by the Mississippi R&D Center in 1966 in Mississippi's Advantages for the Manufacture of Upholstered Furniture. The report forecast and perhaps helped expedite the phenomenal growth that has occurred in the upholstered furniture industry in the state's northern counties in the last 20 years. Development of the industry in other regions over the next 20 years would be

facilitated by similar information in a well-prepared, objective report of the region's "major advantages."

Table 1. Highlights from USDA Forest Service Resource Bulletin SO-128, Forest Statistics for Southwest Mississippi Counties-1987.<sup>1</sup>

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1. Southwest Mississippi is heavily forested--the 2.8 million acres of timberland represent 63 percent of the total land area.
  2. Oak-hickory forest types have increased by 32 percent to over 1 million acres since 1977. Oak-pine, however, decreased by 13 percent and pine forest types decreased by 3 percent based on area.
  3. Sawtimber stands have increased by 8 percent since 1977, and now account for over 60 percent of total timberland in the region.
  4. Softwood growing stock volume decreased by 7 percent since 1977 (softwood removals increased 17 percent, while growth declined by 30 percent). More softwood volume is currently being cut than is being grown each year (by a small margin).
  5. Hardwood volumes increased by 25 percent since 1977, and hardwood sawtimber has increased by 35 percent. Although hardwood removals have increased significantly, hardwood timber volumes are growing at more than twice the rate at which they are currently being cut. (It should be noted, however, that physical inventory is not the only factor to consider in resource availability--ownership and economic accessibility must also be considered.)
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<sup>1</sup>The Forest Service includes Adams, Amite, Claiborne, Copiah, Hinds, Jefferson, Lincoln, Madison, Pike, and Wilkinson counties in the Southwest region.



Table 2. References and Sources of Related Information.

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The Mississippi Furniture Industry and Its Use of Wood-Based Materials--a 20-page report available from S. H. Bullard, Department of Forestry, P. O. Drawer FR, Mississippi State, MS 39762 (contains many references on the industry and its use of wood products).

Forest Statistics for Southwest Mississippi Counties-1987--a 33-page report based on the USDA Forest Service's Forest Survey for 1987. Available from the USDA Forest Service, Forestry Sciences Lab, P. O. Box 906, Starkville, MS 39759.

Furniture Manufacturing and Marketing in the "American Economic Transition"--a 21-page report available from S. H. Bullard, Department of Forestry, P. O. Drawer FR, Mississippi State, MS 39762.

Material Usage Trends in the Wood Household Furniture Industry--a 10-page report available from the USDA Forest Service, Northeastern Forest Experiment Station, Forestry Sciences Lab, 359 Main Road, Delaware, OH 43015.

Opportunities for Industrial Expansion-A Northeast Mississippi Furniture Industry Market Void Approach--a 40-page report by Mississippi R&D Center staff, Jackson (currently part of the Department of Economic Development).

Mississippi's Advantages for the Manufacture of Upholstered Furniture--a 25-page report by Mississippi R&D Center staff (published in 1966).

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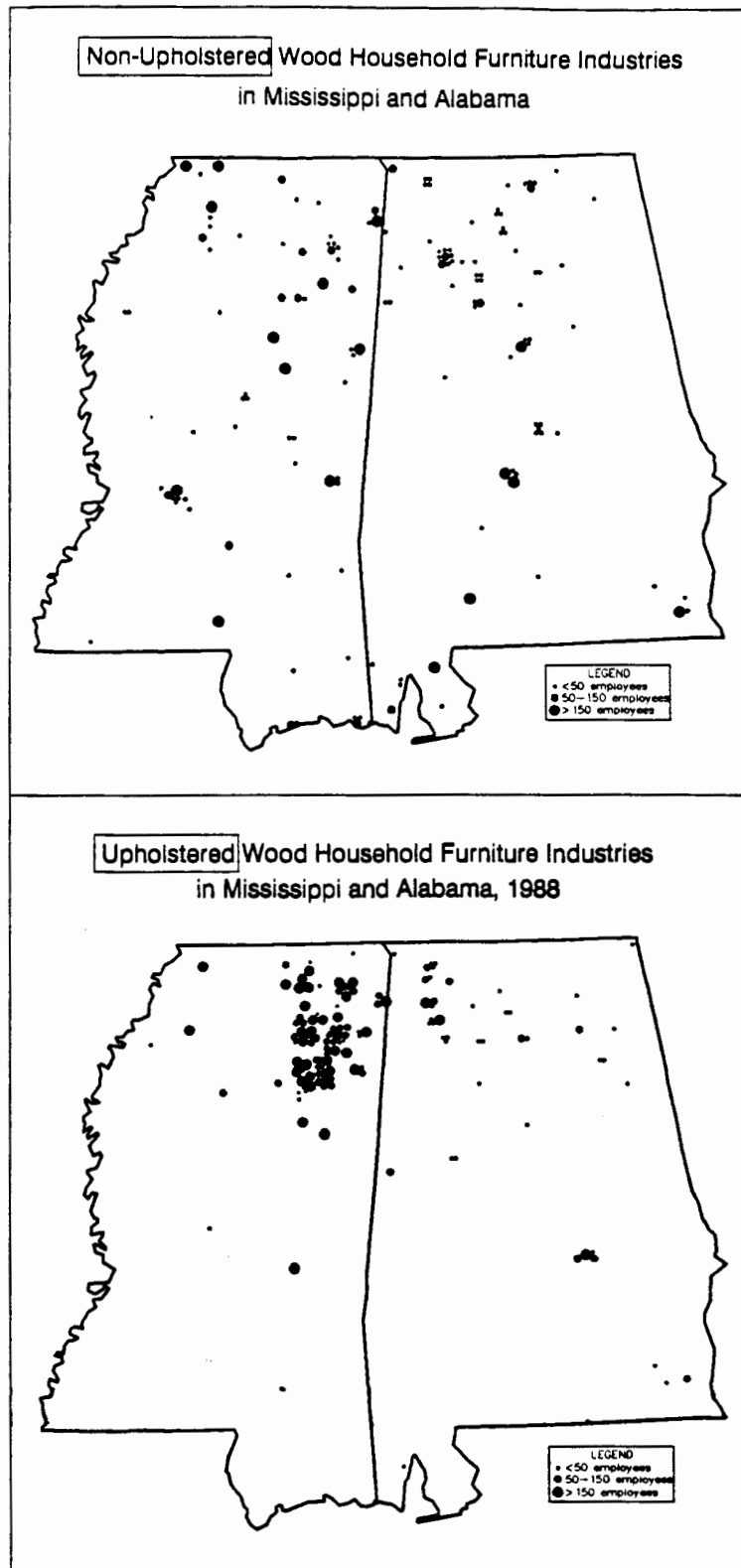


Figure 1. Locations of non-upholstered and upholstered, wood household furniture establishments in Mississippi and Alabama, 1988 (sources: Mississippi Manufacturers Directory 1989, and Alabama Mining and Manufacturing Directory 1989-90).



# Hardwood Timber Removals, 1978-1988, Southwest Region\*

County-level harvests are presented to show trends in hardwood removals over time. Mean volumes are also presented, however, for comparison of the relative magnitude of pulpwood and sawtimber harvest between counties.

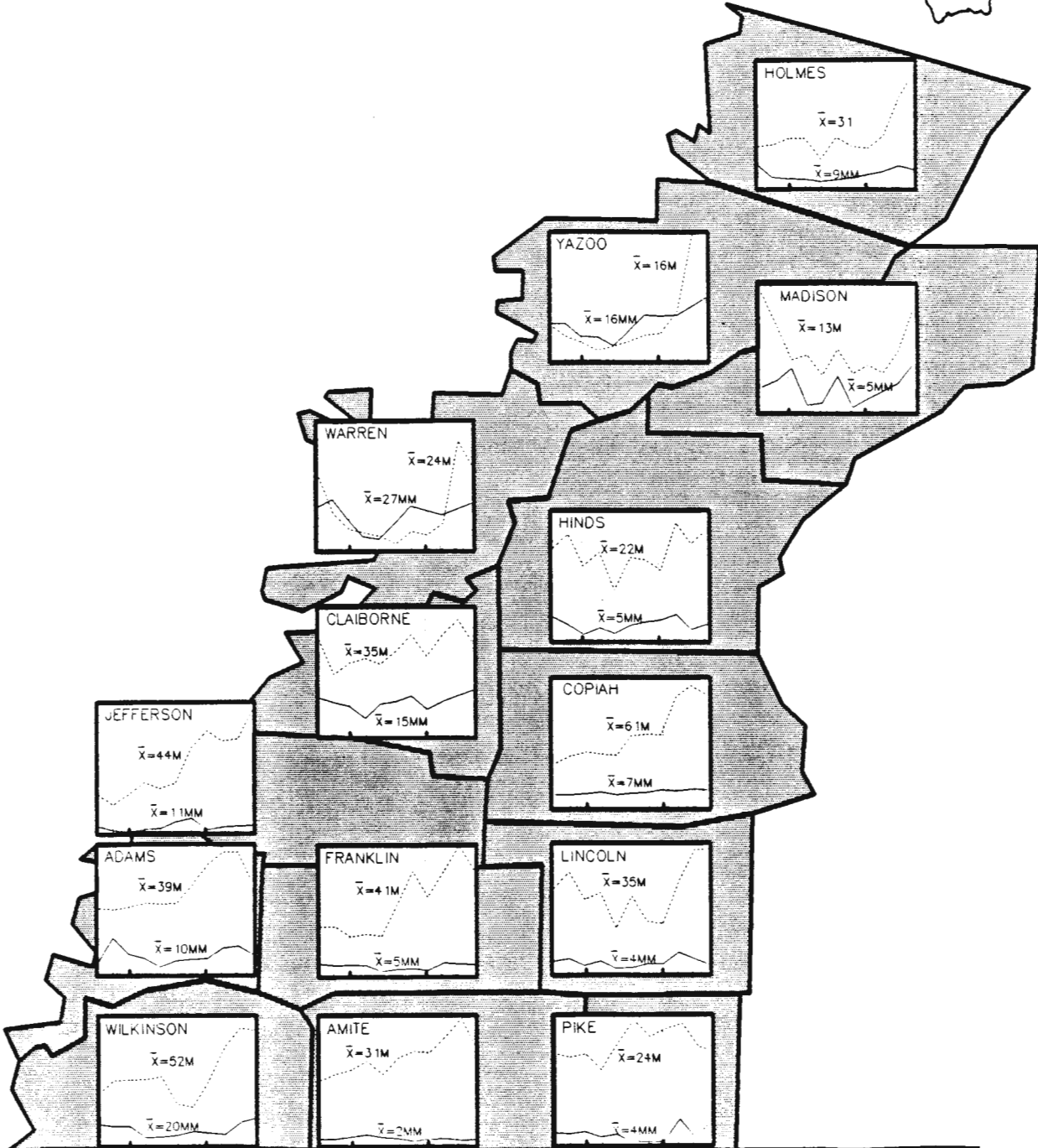
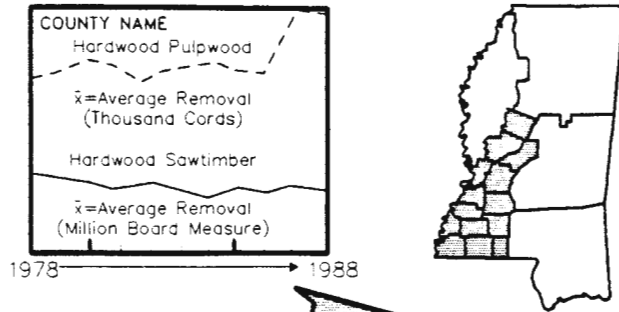
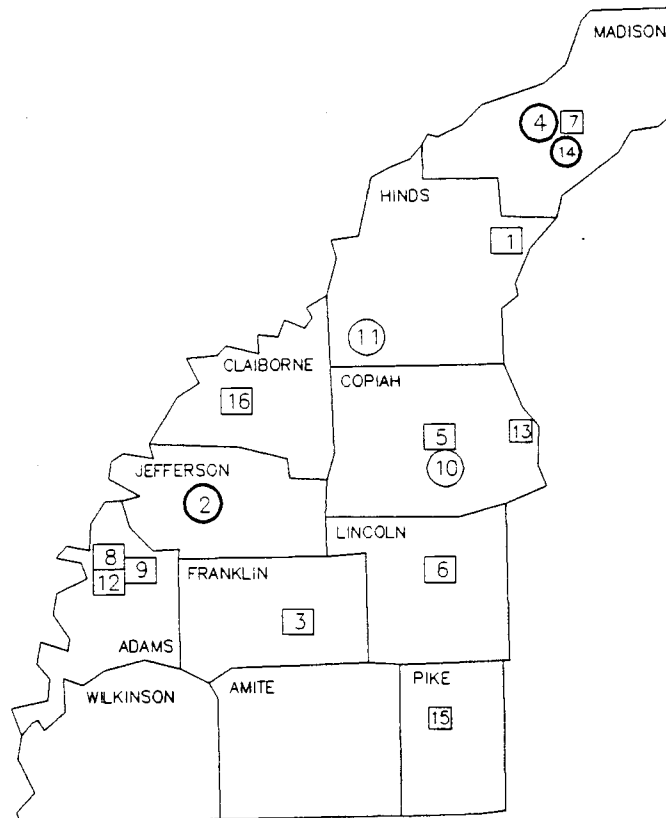
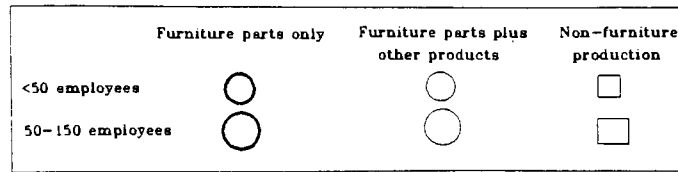


Figure 2. Hardwood pulpwood and sawtimber removals, 1978-1988, Southwest region (based on severance tax data provided by the Mississippi Cooperative Extension Service).  
 \*Holmes, Yazoo, and Warren counties were added to the USDA Forest Service Southwest region counties in this Figure.

# Hardwood Dimension and Flooring Mills in Mississippi, 1988, Southwest Region



## Company Name, City, # Employees

- |   |   |
|---|---|
| 1. Continental Wood Products, Inc., Jackson, 80 | 10. Kitchens Brothers Manufacturing Co., Hazlehurst, 75 |
| 2. Fayette Enterprises, Inc., Fayette, 65       | 11. Kitchens Brothers Manufacturing Co., Utica, 80      |
| 3. Franklin Timber Co., Bude, 78                | 12. McGehee-Burkley Lumber Co., Inc., Natchez 54        |
| 4. Hall Wood Products, Inc., Canton, 70         | 13. Monticello Hardwood, Inc., Georgetown, 13           |
| 5. Hazlehurst Lumber Co., Inc., Hazlehurst, 98  | 14. National Frame Co. South, Canton, 15                |
| 6. Industrial Hardwood Products, Brookhaven, 70 | 15. Three S Enterprises, Inc., McComb, 26               |
| 7. J. A. Lacour & Co., Canton, 26               | 16. V & B International, Inc., Port Gibson, 63          |
| 8. J. M. Jones Lumber Co., Inc., Natchez, 91    |   |
| 9. KCS Lumber Co., Natchez, 72                  |   |

Figure 3. Hardwood dimension and flooring mills in the Southwest region of Mississippi, 1988 (source: Mississippi Manufacturers Directory 1989).

# Hardwood Dimension and Flooring Mills in Mississippi, 1988, North Region

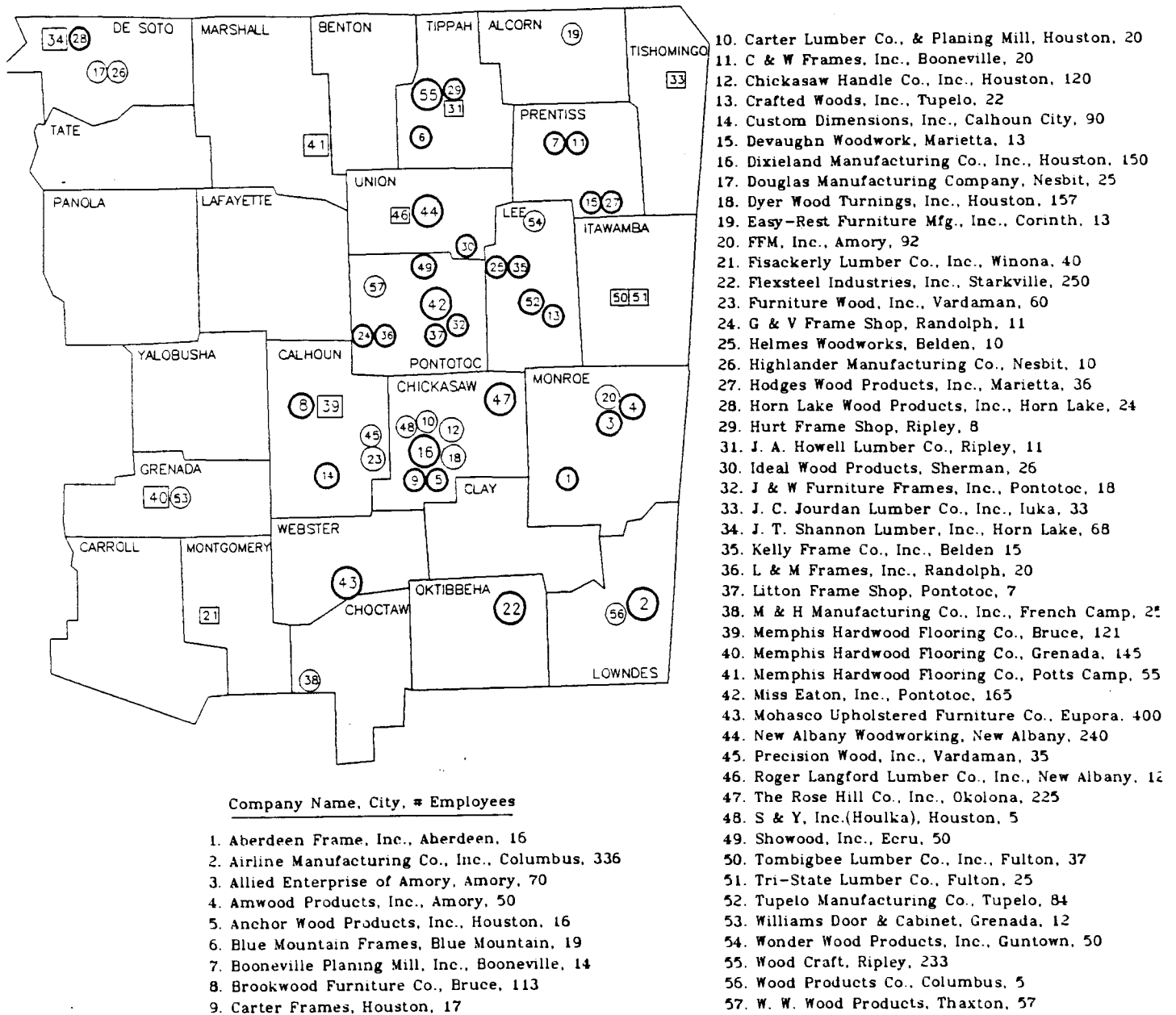
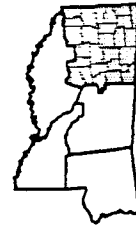
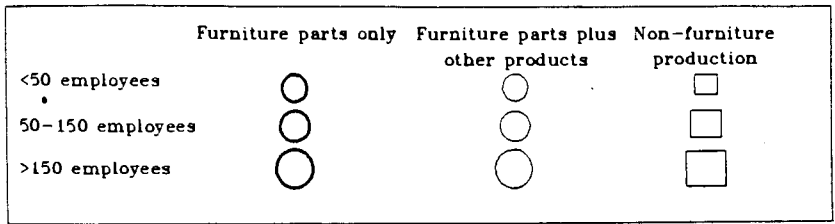


Figure 4. Hardwood dimension and flooring mills in the North region of Mississippi, 1988 (source: Mississippi Manufacturers Directory 1989).

## Hardwood Dimension and Flooring Mills in Mississippi and Alabama

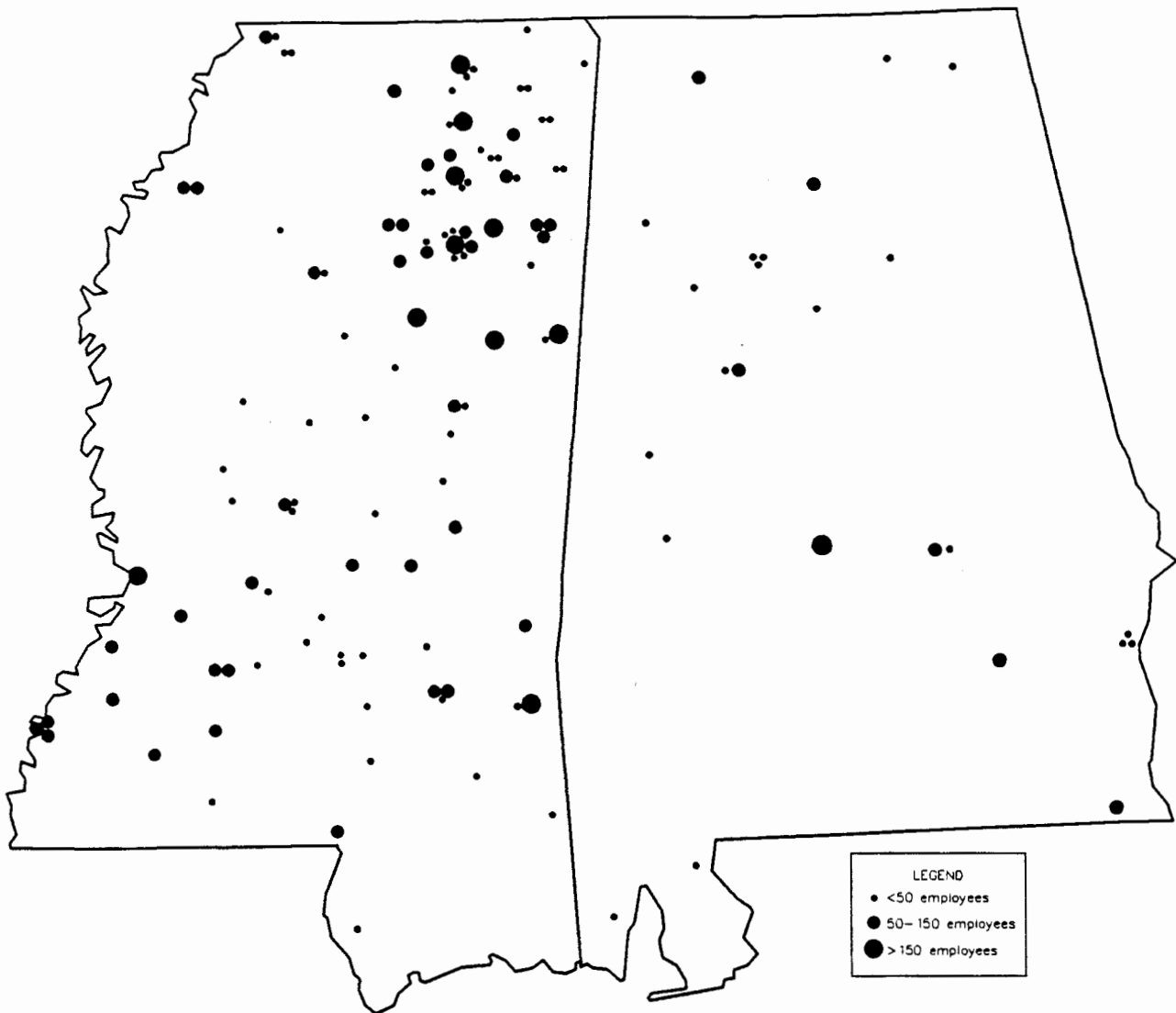


Figure 5. Locations of hardwood dimension and flooring mills in Mississippi and Alabama, 1988 (sources: Mississippi Manufacturers Directory 1989, and Alabama Mining and Manufacturing Directory 1989-90).