A Blueprint for
Forest Products Industry
Economic Development

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Forest Products Marketing Program
Louisiana Forest Products Laboratory
Louisiana State University Agricultural Center

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Overview

Integrated Development & Planning Model

Major Model Components
- Resource Assessment
- Industry Structure
- Product/Market Strategy
- Economic Impacts
- Social Interactions

Getting from Analysis to Action
Industry Development is Multi-Faceted

- Workforce Training
- Network Formation
- Financing
- Marketing
- Economic Development
- Resource Assessment
- Economic Incentives
- Inter-Agency Cooperation
- Government Support
## Integrated Market-Based Value-Added Forest Sector Economic Development

<table>
<thead>
<tr>
<th>Resource Assessment</th>
<th>Industry Structure Profile</th>
<th>Market Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Current &amp; projected</td>
<td>• Current products</td>
<td>• Domestic</td>
</tr>
<tr>
<td>• Commercial species</td>
<td>• Potential products</td>
<td>• Regional</td>
</tr>
<tr>
<td>• Lesser-used species</td>
<td>• Business development</td>
<td>• Global</td>
</tr>
<tr>
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### Resource Assessment
- Current & projected
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### Industry Structure Profile
- Current products
- Potential products
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- Technology
- Profitability

### Market Assessment
- Domestic
- Regional
- Global

### Economic Effects
- Downstream multipliers
- Sensitivity analysis

### Training & Development
- Skilled, semi-skilled, Mgt.
- Basic & remedial

### Social Structure
- Demographics
- Work readiness
## Integrated Market-Based Value-Added Forest Sector Economic Development

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<th>Social Structure</th>
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<tr>
<td>- Demographics</td>
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<tr>
<td>- Work readiness</td>
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<tr>
<th>Community Development Issues</th>
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<tr>
<td>- Stakeholder Inclusiveness</td>
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<tr>
<td>- Interaction</td>
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<tr>
<th>Other Issues</th>
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<tbody>
<tr>
<td>- Environmental</td>
</tr>
<tr>
<td>- Political</td>
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</table>

- **Resource Assessment**
  - Current & projected
  - Commercial species
  - Lesser-used species

- **Industry Structure Profile**
  - Current products
  - Potential products
  - Business development
  - Technology
  - Profitability

- **Market Assessment**
  - Domestic
  - Regional
  - Global

- **Economic Effects**
  - Downstream multipliers
  - Sensitivity analysis

- **Training & Development**
  - Skilled, semi-skilled, Mgt.
  - Basic & remedial

- **Social Structure**
  - Demographics
  - Work readiness

- **Community Development Issues**
  - Stakeholder Inclusiveness
  - Interaction

- **Other Issues**
  - Environmental
  - Political
In general, forest products companies located in rural areas provide jobs with wages competitive with other industries.

In places where jobs are scarce, forest products jobs often provide alternatives to forced migration or commuting.
Major Model Components

Resource Assessment

Industry Structure
Product/Market Strategy
Economic Impacts
Social Interactions
Structural Impediments
Key Questions
Resource Assessment

Is the availability of timber resources a barrier to the development of the value-added secondary forest products industry?

Is the focal region located within reasonable transporting distance of significant standing timber inventories?

What are the trends: ownership, forestland acreage, growing stock, growth/removals, sawtimber, diameter classes, species, etc.
Macon Ridge Forestland Area by Parish

(Thousand of Acres)

- Ouachita: 256.5
- Caldwell: 253.98
- Morehouse: 181.56
- Catahoula: 157.95
- Concordia: 151.12
- Madison: 118.83
- Tensas: 116.43
- Franklin: 89.3
- Richland: 67.98
- East Carroll: 43.42
- West Carroll: 22.18
Change in Timberland Area 1984-1991

by Parish

Thousands of Acres

<table>
<thead>
<tr>
<th>Parish</th>
<th>Change in Acres</th>
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<tbody>
<tr>
<td>Caldwell</td>
<td>0.039</td>
</tr>
<tr>
<td>Catahoula</td>
<td>-19.09</td>
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<tr>
<td>Concordia</td>
<td>-21.41</td>
</tr>
<tr>
<td>East Carroll</td>
<td>16.37</td>
</tr>
<tr>
<td>Franklin</td>
<td>0.17</td>
</tr>
<tr>
<td>Madison</td>
<td>14.25</td>
</tr>
<tr>
<td>Morehouse</td>
<td>-7.11</td>
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<tr>
<td>Ouachita</td>
<td>26.32</td>
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<tr>
<td>Richland</td>
<td>35.56</td>
</tr>
<tr>
<td>Tensas</td>
<td>2.47</td>
</tr>
<tr>
<td>West Carroll</td>
<td>10.81</td>
</tr>
</tbody>
</table>
1991 Macon Ridge Timberland Area by Ownership

Thousands of Acres

- Other Public: 234.52
- Forest Industry: 382.08
- Private: 614.72
Macon Ridge Forestland Area by Forest Type

1991

(thousand of acres)

- Oak-Gum-Cypress: 788.71
- Loblolly/Shortleaf: 290.92
- Oak-pine: 147.4
- Oak-Hickory: 139.89
- Elm-ash-Cottonwood: 92.33
Growing Stock Volume by Species

1991

1.98 Billion Cubic Feet Total

- Other white oaks 17.3%
- Loblolly pine 22.4%
- Sweetgum 12.6%
- Select red oaks 5.8%
- Water hickory 4.8%
- Elms 4.0%
- Willow 3.5%
- Sugarberry 3.4%
- Baldcypress 3.2%
- Green Ash 2.5%
- Cottonwood 2.6%
- Shortleaf pine 1.9%
- Other red oaks 2.8%
- Other white oaks 3.0%
- Other 10.2%
Change in Growing Stock Volume by Species

From 1984 to 1991
Million Cubic Feet

<table>
<thead>
<tr>
<th>Species</th>
<th>Change (Million Cubic Feet)</th>
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<tbody>
<tr>
<td>Willow</td>
<td>-27,128,651</td>
</tr>
<tr>
<td>Loblolly Pine</td>
<td>-23,327,973</td>
</tr>
<tr>
<td>Cottonwood</td>
<td>-21,207,369</td>
</tr>
<tr>
<td>Shortleaf pine</td>
<td>-932,647</td>
</tr>
<tr>
<td>Select White</td>
<td>3,519,601</td>
</tr>
<tr>
<td>Sweetgum</td>
<td>4,143,233</td>
</tr>
<tr>
<td>Elms</td>
<td>7,913,150</td>
</tr>
<tr>
<td>Green ash</td>
<td>11,120,690</td>
</tr>
<tr>
<td>Other red</td>
<td>11,748,341</td>
</tr>
<tr>
<td>Water Hickory</td>
<td>13,461,361</td>
</tr>
<tr>
<td>Select red</td>
<td>14,761,131</td>
</tr>
<tr>
<td>Other</td>
<td>16,082,063</td>
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<tr>
<td>Baldcypress</td>
<td>19,997,414</td>
</tr>
<tr>
<td>Sugarberry</td>
<td>23,897,191</td>
</tr>
<tr>
<td>Other white</td>
<td>35,218,676</td>
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</table>
# Change in Sawtimber Volume 1984-91
by Diameter Class and Species Group
(Billion Board Feet)

<table>
<thead>
<tr>
<th>Diameter Class (inches)</th>
<th>10</th>
<th>12</th>
<th>14</th>
<th>16</th>
<th>18</th>
<th>20</th>
<th>22</th>
<th>24</th>
<th>26</th>
<th>28</th>
<th>30</th>
<th>&gt;31</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pine</td>
<td>-0.0679</td>
<td>-0.0192</td>
<td>0.0375</td>
<td>-0.1603</td>
<td>-0.1443</td>
<td>-0.0477</td>
<td>0.0181</td>
<td>0.0166</td>
<td>0.0118</td>
<td>0.0110</td>
<td>-0.0280</td>
<td>0.0254</td>
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<tr>
<td>Cypress</td>
<td>-0.0105</td>
<td>-0.0027</td>
<td>0.0384</td>
<td>0.0420</td>
<td>0.0088</td>
<td>0.0146</td>
<td>0.0022</td>
<td>-0.0006</td>
<td>0.0187</td>
<td>0.0015</td>
<td>-0.0040</td>
<td>0.0015</td>
</tr>
<tr>
<td>Soft Hardwood</td>
<td>0.0000</td>
<td>-0.0065</td>
<td>0.0232</td>
<td>0.0070</td>
<td>0.0020</td>
<td>-0.0159</td>
<td>0.0189</td>
<td>-0.0593</td>
<td>0.0121</td>
<td>-0.0107</td>
<td>0.0287</td>
<td>-0.0980</td>
</tr>
<tr>
<td>Hard Hardwood</td>
<td>0.0000</td>
<td>0.0217</td>
<td>0.0199</td>
<td>0.1310</td>
<td>0.0056</td>
<td>0.1531</td>
<td>0.0140</td>
<td>0.0396</td>
<td>0.0484</td>
<td>0.0210</td>
<td>0.0492</td>
<td>0.0625</td>
</tr>
</tbody>
</table>
Growth/Removals By Species Group by Ownership

1974-1984

<table>
<thead>
<tr>
<th>Species Group</th>
<th>Other Public</th>
<th>Forest Industry</th>
<th>Private</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pine</td>
<td>0.69</td>
<td>108</td>
<td></td>
</tr>
<tr>
<td>Soft Hardwoods</td>
<td>4.46</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Hard Hardwoods</td>
<td>2.91</td>
<td>152</td>
<td></td>
</tr>
<tr>
<td>Other Public</td>
<td>3.53</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forest Industry</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Louisiana - 100 Mile Radius From Macon Ridge

Volume By Species
Million Board Feet

- Yellow-poplar: 60
- Cottonwood: 129
- Elm sp.: 281
- Ash sp.: 395
- White oaks: 802
- Red Oaks: 2,240
- Other species: 6,389
- S. Yellow Pines: 7,304
### Mississippi - 100 Mile Radius from Macon Ridge

**Volume By Species**

**Million Board Feet**

<table>
<thead>
<tr>
<th>Species</th>
<th>Volume (Million Board Feet)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other species</td>
<td>954</td>
</tr>
<tr>
<td>S. Yellow Pines</td>
<td>10,400</td>
</tr>
<tr>
<td>Red Oaks</td>
<td>16,200</td>
</tr>
<tr>
<td>White oaks</td>
<td>7,110</td>
</tr>
<tr>
<td>Ash sp.</td>
<td>2,450</td>
</tr>
<tr>
<td>Elm sp.</td>
<td>1,330</td>
</tr>
<tr>
<td>Yellow-poplar</td>
<td>561</td>
</tr>
<tr>
<td>Cottonwood</td>
<td>580</td>
</tr>
</tbody>
</table>
Target Species

- Southern Yellow Pine
- Ash
- Cottonwood/Basswood
- Elm
- Sweetgum
- Red Oak
- White oak

- Other Utility Grade Species

Based on wood characteristics of the species and not simply on the basis of grading. The woods are 1) sugarberry (hackbery), 2) tupelo-blackgum, 3) water hickory, and 4) willow.
Target Species

- Current and Projectected Supply
- Uses
- Markets
- Competitive Issues
Major Model Components

Resource Assessment
Industry Structure
Product/Market Strategy
Economic Impacts
Social Interactions
Structural Impediments
Key Questions-Industry Structure

What is the structure of the established primary and secondary forest products industry base?

What types of manufacturing processes and equipment do current companies use?

Is there the presence of sawmills, dry kilns, millwork plants, OSB production which could support significant development?

Are companies able to compete in the markets they serve.

How have those companies which have grown and prospered done so? (exploiting specialty niches, cutting costs, etc).
Percent of Companies By Sales Category
(n=145 respondent companies)

- Less than $50 Thousand: 17.9%
- $50-$99 Thousand: 10.3%
- $100-$249 Thousand: 22.8%
- $250-$499 Thousand: 11.7%
- $500-$999 Thousand: 13.8%
- $1-$4.9 Million: 2.1%
- $5-$9.9 Million: 3.4%
- Greater than $10 Million: 3.4%

Sales in 1995
Employment in 1995
Percent of Companies By Employment Category
(n=151 respondent companies)

5 or less employees
53.6%

6-9 employees
12.6%

10-24 employees
17.2%

25-49 employees
10.6%

50-74 employees
2.6%

75-99 employees
1.3%

100-149 employees
1.3%

150 or more employees
0.7%
Planned Employment Additions

Number of Companies By Sales Category

(n=145 respondent companies)

<table>
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<tr>
<th>Company Sales Category</th>
<th>Less than $50K</th>
<th>$50K-$99K</th>
<th>$100K-$249K</th>
<th>$250K-$499K</th>
<th>$500K-$999K</th>
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<th>$5-$9.9 Million</th>
<th>Greater than $10 Million</th>
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<tbody>
<tr>
<td>Add in 1997</td>
<td>7</td>
<td>8</td>
<td>13</td>
<td>6</td>
<td>11</td>
<td>13</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Add 1998-2000</td>
<td>11</td>
<td>4</td>
<td>12</td>
<td>9</td>
<td>12</td>
<td>13</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>18</td>
<td>12</td>
<td>25</td>
<td>15</td>
<td>23</td>
<td>26</td>
<td>2</td>
<td>5</td>
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Markets for Louisiana Secondary Wood Products Producers

Percent to Each Market by Sales Category in 1995
(n=145 respondent companies)

- Less than $50K
- $50K-$99K
- $100K-$249K
- $250K-$499K
- $500K-$999K
- $1-$4.9 Million
- $5-$9.9 Million
- Greater than $10 Million

Graph showing the percentage of sales in Louisiana, to other states, and exports for each sales category.
Major Products Produced by
Louisiana Secondary Wood Products Manufacturers
(Number of Responses)

- Cabinets: 90
- Furniture: 43
- Millwork: 31
- Doors: 25
- Pallets: 17
- Moulding: 14
Products Produced

- Architectural Millwork
- Cabinets
- Furniture
- Hardwood Lumber
- Pine Lumber
- Plywood
- Medium Density Fiberboard
- Oriented Strandboard
- Pallets
- Plugs
Distribution Channels

Percent of 1995 Sales
(n=143)

- Direct to Customers: 64.2%
- Furniture Galleries: 19%
- Home Building Contractors: 8.9%
- Other: 2.8%
- Distribution Intermediaries: 11.1%
- Retailers: 11.1%
Company Success Factors

Levels of Importance

(n=150 companies)

Company Reputation: 4.9
Product Quality: 4.8
Long-term customer relationships: 4.8
Fair prices: 4.6
High level of customer service: 4.6
Fast response to inquiries: 4.4
Product availability: 4.4
Flexible delivery: 4.2
Knowledgable salespersons: 4.1
Access to markets: 3.6
Distribution capabilities: 3.4
Marketing skills: 3.2
Computer capabilities: 2.8

(Scale: 1=very unimportant to 5=very important)
Major Model Components

Resource Assessment
Industry Structure
Product/Market Strategy
Economic Impacts
Social Interactions
Structural Impediments
Key Questions
Product/Market

What is the product mix of the companies?

What are current markets and customer bases? (Both domestic and export).

What is the quality and level of acceptance in current markets?

What is the distribution reach?
Market Opportunities Analysis

- Identify Attractive Segments
- Align Segment & Product Strategies
- Identify Product Enhancements & New Products
- Develop Product Differentiation Strategies
- Develop Segment Positioning Strategies

- Review the Market
  - Products
  - Customers

- Segment the Market
  - Select Segmentation Variables
  - Prioritize Variables
  - Develop Segment Requirements
Market based criteria were developed to assess potential wood products and industry segments long-term development potential.

The criteria used were:

- raw material availability
- available markets (local, Regional, national or global)
- market growth rate
- competitive factors
- provides employment opportunities
- distribution infrastructure exists or can be developed
Market Opportunities Analysis

Additional criteria:

- Manufacturing facility requirements
- Waste facilities requirements (sewers, landfills)
- Capital requirements
- Workforce skill requirements
- Access to raw materials
- Consistency with overall economic development plan
- Consistency with manufacturing network strategy
- Complements existing businesses
- Other economic benefits
- Pollution concerns (air, water, noise)
- Environmental effects
## Summary Criteria Evaluation for Major Product Groups

<table>
<thead>
<tr>
<th>Product Sector</th>
<th>Score Sum of Ratings</th>
<th>Weight x Rating/Total Possible Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ready-To-Assemble Furniture</td>
<td>50</td>
<td>412/590 = 70%</td>
</tr>
<tr>
<td>Architectural Millwork</td>
<td>48</td>
<td>403/590 = 68%</td>
</tr>
<tr>
<td>Household Furniture</td>
<td>46</td>
<td>380/590 = 64%</td>
</tr>
<tr>
<td>Pallets</td>
<td>42</td>
<td>370/590 = 63%</td>
</tr>
<tr>
<td>Flooring</td>
<td>37</td>
<td>316/590 = 54%</td>
</tr>
<tr>
<td>Cabinets</td>
<td>33</td>
<td>280/590 = 47%</td>
</tr>
<tr>
<td>Competitive Strength</td>
<td>STRONG</td>
<td>MODERATE</td>
</tr>
<tr>
<td>----------------------</td>
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<td>----------</td>
</tr>
<tr>
<td><strong>Market Attractiveness:</strong></td>
<td>Extend Position</td>
<td>Invest to Build</td>
</tr>
<tr>
<td>HIGH</td>
<td>• Invest to grow at maximum digestible rate</td>
<td>• Challenge for industry leadership</td>
</tr>
<tr>
<td></td>
<td>• Concentrate effort on maintaining strength</td>
<td>• Build selectively on strengths</td>
</tr>
<tr>
<td>MEDIUM</td>
<td>Build Selectively</td>
<td>Invest Selectively</td>
</tr>
<tr>
<td></td>
<td>• Invest heavily in most attractive segments</td>
<td>• Protect existing programs</td>
</tr>
<tr>
<td></td>
<td>• Build ability to counter competition</td>
<td>• Concentrate investments on segments where profitability is good and risk is relatively low</td>
</tr>
<tr>
<td></td>
<td>• Emphasize profitability by increasing productivity</td>
<td></td>
</tr>
<tr>
<td>LOW</td>
<td>Protect &amp; Refocus</td>
<td>Harvest</td>
</tr>
<tr>
<td></td>
<td>• Manage for current earnings</td>
<td>• Protect position in most profitable segments</td>
</tr>
<tr>
<td></td>
<td>• Concentrate on attractive segments</td>
<td>• Upgrade product lines</td>
</tr>
<tr>
<td></td>
<td>• Defend strengths</td>
<td>• Minimize new investments</td>
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### Market Strategy Map

#### Competitive Strength

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<th></th>
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<th>MODERATE</th>
<th>WEAK</th>
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<tr>
<td>Market Attractiveness</td>
<td>Extend Position</td>
<td>Invest to Build</td>
<td>Build Cautiously</td>
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<td>Architectural Millwork</td>
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<td>RTA Furniture</td>
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<td>MEDIUM</td>
<td>Build Selectively</td>
<td>Invest Selectively</td>
<td>Limit Expansion</td>
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<td>Hardwood Flooring</td>
<td>Cabinets</td>
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<td></td>
<td></td>
<td>Household Furniture</td>
<td>Pallets</td>
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<tr>
<td>LOW</td>
<td>Protect &amp; Refocus</td>
<td>Harvest</td>
<td>Divest</td>
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</tbody>
</table>

- Millwork
- RTA Furniture
- Hardwood Flooring
- Household Furniture
- Cabinets
- Pallets
Major Model Components

Resource Assessment
Industry Structure
Product/Market Strategy
Economic Impacts
Social Interactions
Structural Impediments
Key Questions
Economic Impacts

What economic impacts result from forest based industry development?

What are the ramifications at the community, regional and state levels?
Economic Impacts

- Employment Impacts
- Multiplier Effects
- Income Effects
- Community & Region

Current Industry
Economic Indicators

Scenario Analysis
Major Model Components

- Resource Assessment
- Industry Structure
- Product/Market Strategy
- Economic Impacts
- Social Interactions
- Structural Impediments
Key Questions
Social Structure

What are the underlying socio-economic issues that influence forest based industry development?

What are current policies and programs?

What changes in policies & programs would facilitate development efforts?
Social Impacts

Current Socio-Economic Structure

Scenario Analysis

Educational Attainment

Drug Abuse

Family/Social Structure

Federal/State Programs
Major Model Components

Resource Assessment
Industry Structure
Product/Market Strategy
Economic Impacts
Social Interactions
Structural Impediments
Key Questions
Structural Impediments

What are the most important factors preventing manufacturing industry development?

What will it take to encouraging manufacturing?
Impediments to Company Success

Level of Agreement
(n=150 companies)

(Scale: 1=strongly disagree to 5=strongly agree)

- Getting quality raw materials: 4.4
- Getting consistent raw materials: 4.4
- Volatile pricing: 4.0
- Finding ways to promote products: 3.7
- Not enough capacity: 3.5
- Competition from in state suppliers: 3.1
- Competition from regional suppliers: 3.1
- Insufficient processing capabilities: 3.0
- Lack of adequate machinery: 3.0
- Delivery problems: 2.9
Where do we go from here?
Getting From Analysis to Action
# Integrated Market-Based Forest Sector Economic Development

## Sustainability

### Resource Assessment
- Current & projected
- Commercial species
- Lesser-used species

### Industry Structure Profile
- Current products
- Potential products
- Business development
- Technology
- Profitability

### Market Assessment
- Domestic
- Regional
- Global

### Community Development Issues
- Stakeholders
- Social interaction

### Other Issues
- Environmental
- Political

## Recommendations for Policy Makers

## Implementation Support
Questions?