



FOREST PRODUCTS NEWS

VOLUME 18, ISSUE 9

MAINE FOREST PRODUCTS COUNCIL

DECEMBER 2004

Future Forest Economy Project Nears Completion: Offers Draft Report



The *Maine Future Forest Economy Project*, an initiative launched last spring by the Maine Department of Conservation, is nearing the final stages of completion. State officials conceived the multi-phase research project last year as part of a broader effort to better understand and support Maine's forest products industry. The project focuses on identifying and addressing the challenges facing the

forest products manufacturers. With close cooperation from the Maine Forest Service and additional funding provided by the Maine Technology Institute (MTI), the project examined a host of state, regional and global trends influencing the industry's ability to compete, grow and explore new wood-processing opportunities.

The project contains four phases: Phase 1: An assessment of the current status and prognosis of Maine's pulp &

paper mills, sawmills, secondary wood product manufacturers, engineered wood facilities and wood energy plants; Phase 2: A statistically valid survey of the attitudes of Maine citizens regarding the forest products industry and attitudes regarding measures that might be taken to enhance its future; Phase 3: Identification of specific and realistic actions needed to create, sustain, and enhance new wood-using industries in Maine, as well as Maine's forest products industry cluster; and Phase 4: Presentation of the findings of this report at three public forums organized by the Maine Department of Conservation.

Funding from MTI allowed the researchers to conduct interviews with investors and lenders regarding Maine's investment climate; commission white papers on Maine's role in the global forest products economy, quantify the industry's market competitiveness and examine how other states are supporting their forest products industry.

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New Restrictions on White Pine Movement To and Within Maine

by David Struble, Maine Forest Service

In late October, the Maine Forest Service (MFS) was notified by the USDA Animal and Plant Health Inspection Service (APHIS) that the Compliance Agreement and Limited Permit processes that authorized movement and processing of pine materials from the pine shoot beetle (PSB) regulated portions of the region into uninfested areas did not meet the current interpretations of the regulations. Therefore, for the October 1 to June 30 period, APHIS would not authorize movement of pine logs and waste under these existing legal instruments.

The MFS was also informed that Compliance Agreements and Limited Permits would be necessary for any movement irrespective of the time of year. This situation was further complicated by the recent decisions by the states of Vermont and New Hampshire to put all their counties within the PSB regulated area. MFS's interpretation of the situation

was that any person or business in Maine (outside of Franklin and Oxford County) currently receiving pine logs or bark from anywhere in Vermont or New Hampshire was technically in violation of federal regulations. The federal requirement that the state maintain parallel internal quarantines meant that no wood could legally be moved from Franklin and Oxford County either.

The threatened lockdown by APHIS was an abrupt and extreme departure from their previously authorized practices, and appeared to be unwarranted. MFS informed APHIS representatives that shutting down movement of pine from October 1 to June 30 would result in serious harm to Maine's pine processing industry and would unreasonably penalize the communities that depend on those industries. The MFS also engaged the Governor's Office and the Legislative Delegation in the discus-

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**President's Message:
The Alamo, But With Reasons for Optimism**

When you have spent a lot of time advocating for the forest products industry, some times it seems like defending the Alamo. No matter how many attackers you beat off there is still an overwhelming tide of would-be conquerors. Yet some recent research provides evidence that there have been some very positive changes in public acceptance of what we do in the woods and in the acknowledgment of policy makers that stable natural resource policy, as well as an improving business climate is necessary to secure the investment of Maine's forest products companies need to maintain economic viability in an era of fierce global competition.



Linda Griffin

been saying for so long about steps that Maine government must take to reassure investors, who will be watching for the final recommendations and chances for implementation.

Does this good news mean we can slack off in our efforts? Not at all. In fact, this legislative season may well be critical in our battle to secure the stability we so desperately require. You can be sure there will be dozens of bills introduced that could thwart all progress and, as last year proved, just one legislator can tip the balance. Also the Council will be proactively introducing legislation that will improve our position in the state.

So, you simply must keep yourself aware of what is happening in the legislative arena because the Council relies on you for the contact with your local representatives that can make all the difference. If the Council asks, "Please come to Augusta!" be assured, you are really needed.

I look forward to the work ahead and what we can accomplish together in the coming new year.

"Related polling shows increasing public acceptance of forest practices, understanding of the challenges we face, and even a willingness to offer public financial assistance to beleaguered companies."

The MFPC has just received the draft report on the *Maine Future Forest Economy Project*, a massive project undertaken by the Department of Conservation to better understand how government and business can work together to best preserve our industry's many contributions to the state's economy and welfare of its citizens.

Related polling shows increasing public acceptance of forest practices, understanding of the challenges we face, and even a willingness to offer public financial assistance to beleaguered companies. All the experts interviewed validated what we have

Editor's Note:

Due to recent changes in our communications staff, there was no November 2004 issue. Please bear with us as we make our way through the transition process. Thank you!

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International Paper to Sell 1.1 Million Acres of Maine & New Hampshire Lands to GMO Renewable Resources

International Paper announced in early November that the company will sell its Maine and New Hampshire forestlands, totaling approximately 1.1 million acres, to GMO Renewable Resources, LLC, (GMORR) a private forest investment management company, for approximately \$250 million. The sale is expected to be complete by the first quarter 2005.

International Paper and GMORR have agreed to a long-term wood fiber supply agreement to continue the flow of fiber to IP's Maine paper mills in Jay and Bucksport. The companies have also agreed to a long-term management contract by which IP will provide forest management services, including third-party certification to the Sustainable Forestry Initiative® Standard.

"Our decision to sell these forestlands is based on achieving a superior value for our forestlands while maintaining our ability to provide for the wood fiber needs of our two Maine mills," said George O'Brien, IP's senior vice president-Forest Products.

Bob Saul, director-domestic investments for GMORR, said, "We are very pleased to have entered into this agreement with International Paper. These are some of the most productive, well-managed forestlands in the Northeast. In addition to growing trees for the paper, packaging and wood products markets, we look forward to optimizing the value of these resources and managing the lands as a sustainable working forest. We also hope to build upon our strong relationship with the conservation community to keep this valuable forest resource intact."

"The GMORR agreement also assures that our two companies will work closely to provide continued recreational use and conservation of the land for all who enjoy the outdoors," added O'Brien. "We have agreed with GMORR to continue managing the land to meet or exceed all requirements of sustainable forestry to ensure the protection of wildlife and fish habitat, soils, and air and water quality."

GMORR plans to continue the long standing practice of open access to these forestlands for hunting, fishing, snowmobiling and other traditional outdoor activities that have historically been provided by International Paper. The management of the land base will continue with the same or very similar rules and regulations on responsible public use that are in place today. GMORR also plans to continue the practice of cabin site leasing for the recreational lease holders on these lands and will evaluate the recreational programs on a regular basis.

The forestlands being sold are located primarily in an east-west band across central Maine, with an additional 24,000 acres in northern New Hampshire.

Commenting in an *Associated Press* article, IP Spokesman, Rick Ouellette said, "The sale of our forestlands will in no way jeopardize the future of our paper mills."

While International Paper is one of the world's largest and most recognizable names in the industry, their decision to sell their lands is nothing new. Selling corporate timberlands to focus cost savings and capital investment on manufacturing facilities has become a paper industry standard in the past ten years and is often viewed favorably by Wall Street analysts. IP's stock exhibited a noticeable rise in value on the announcement of the land sale.

Maine Forest Service Director Alec Giffen expressed relief that the sale agreement secures wood supply, sustainability and public access, although he did note that "...these sorts of sales do create a certain amount of anxiety among the public that the things they hold near and dear will remain available."

GMORR had already owned timberland in the western Maine town of Parsonfield, where the company negotiated a conservation easement with the local community, the state and the Maine Chapter of The Nature Conservancy two years ago.



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Maine Greenhouse Gas Initiative Update

by Chuck Kraske, International Paper

The passage of LD 845 *An Act To Provide Leadership in Addressing the Threat of Climate Change*, requires that the Maine Department of Environmental Protection (DEP) develop a “long-term climate action plan” that will achieve reductions in greenhouse gas (“GHG”) emissions by 2010 and 2020.

In cooperation with the DEP, a Stakeholder Advisory Group, including forestry interests, formed a year ago to develop an action plan. The final plan will be submitted to the legislature’s Natural Resource Committee this November.

With respect to forestry, the emissions inventory indicates that Maine forests are still an emitter of GHGs. This is due to the loss of standing forest stocks following the spruce budworm epidemic of the 80’s, and land converted to non-forested use (141,600 acres between 1982 and 1997). The modeling upon which the inventory is built is filled with assumptions and uncertainties and will need to be continually updated as new data is collected. One can reasonably assume that forests would turn into a net sink as the younger stands originating after the budworm epidemic continue to age. However, this needs to be verified by ongoing forest inventories. Even so, GHG emissions from Maine forests were only 3% to 3.5% of total Maine emissions (including transportation, energy production, manufacturing, etc.).

The Forestry Working Group, representing forestry interests on the larger Stakeholder Advisory Group, made several consensus-based recommendations for carbon sequestration opportunities. There are still many unknowns as to whether or not the proposed options will actually result in additional carbon sequestration. Landowners serving on the working group made it very clear that all options should be voluntary, promoted by education and/or incentives - not regulation. Industry members emphasized that requiring mandatory implementation of the options would be a significant disincentive to landowners to maintain active forest land management, further risking forest land conversion to non-forest uses.

Some of the key options recommended were:

Option: Forest land preservation

Potential Benefit: Maintain carbon on land & soil

Option: Early commercial thinning

Potential Benefit: Capture anticipated mortality for energy and wood products

Option: More frequent, lighter harvests

Potential Benefit: Capture anticipated mortality for energy and wood products

Option: Planting fast growing species in poorly stocked stands

Potential Benefit: Better use of available site resources; increase carbon storage in the growing stock.

The best case model predictions are that these options would achieve approximately 10% of the GHG emission reductions required by the Legislature.

One option not recommended by consensus was extending harvest rotation length. The option, as originally proposed, would have delayed harvesting on 100,000 acres per year for 15 years (1.5 MM acres total) with the goal of increasing the size of trees on these stands. Forest landowners on the working group were strongly opposed to this proposal, regardless of implementation method. Some in the group (not forest product industry representatives) were supportive of conducting research to determine if the reduced wood supply from extending harvest rotations could be offset by more intensive forestry activities. Despite the clear split on the working group concerning this option, “extended harvest rotation” is being included in the DEP’s *Climate Action Plan*, even though carbon impacts are still unquantified. DEP’s justification for including the option was that they were going to have difficulty meeting the GHG emission reduction goals, so they needed to include all available options.

Two other options to be contained in the climate action plan, that were not evaluated by the Forestry Working Group are:

- Short rotation woody cropping
- Reforestation of agricultural/pasture lands.

Again, these options are to be evaluated, and carbon impacts are unquantified.

In summary, the DEP is scheduled to submit the final climate action plan to the Natural Resource Committee this November. At that point, the agency will also be preparing and submitting a legislative package to drive its implementation. Unlike the Stakeholder Advisory Group process, the public will have an opportunity to comment on the proposals. It is imperative for the industry to offer up strong and well-documented comments regarding this policy proposal.

The MFPC will be tracking this issue as it makes its way through the review process. For more information, contact Patrick Strauch at (207) 622-9288.

Special thanks to Chuck Kraske of International Paper for providing this update and serving on the GHG Forestry Working Group.

Governor's Task Force on Access Convenes First Meeting

The Governor's Task Force on Traditional Uses & Public Access to Lands in Maine met on October 20 in Shin Pond Village to begin identifying issues and addressing growing public concern about access to private lands.

In his opening remarks, Department of Conservation Commissioner Patrick McGowan outlined the charge of the Task Force members, stating that the work of the group is crucial to future generations who enjoy Maine's forests.

Among the 20-member Task Force group are Maine Forest Product Council member company representatives Gordon Gamble of Wagner Forest Management and Seven Islands Land Company President John Cashwell and Forester Sarah Medina.

Commissioner McGowan said that Governor Baldacci wants the group to look at the long term economic trends impacting land use but also acknowledged that the administration has not shied away from the term "wilderness" as one of the desired outcomes. He noted the significant turnover in landownership in recent years and the fact that today's landowners are considering charging for access to their lands.

Following an overview of the Group's mission and duties, Karin Tilberg of the DOC gave presentations on two previous legislative studies on public access, *A Report of the Committee to Study Access to Private and Public Lands in Maine*, published in February, 2001 and *A Report of the Committee to Study Issues Concerning Changes to the Traditional Uses of Maine Forests and Lands*, published in December, 2001. Both of these studies are available from the Office of Policy and Legal Analysis by calling (207) 287-1549.

As DOC staff presented the draft work plan, it was emphasized that a key ingredient to the Task Group's success will be an understanding of the historic and legal aspects of the issue. The work will focus on four areas:

1. Legal review of private rights and public rights regarding recreational use on privately-owned lands (Great Ponds law, liability laws, interface with easements, etc.) – request AG's Office to prepare and present.
2. The tradition of public use on private lands in Maine – a historical overview with examples of how Maine has developed a network of reliance (economic and otherwise) based on these traditions; creative examples of partnerships have developed regarding trails (hiking, snowmobiling, ATV and other); model agreements – DOC and IF&W will present; task force members will then share experiences; future trends.
3. Overview of typical changes to public use on private lands and how parties have made transitions in the past – what has worked and what hasn't worked.

4. How can Maine (private landowners, public users, state agencies, interested parties) minimize the impacts of change when access is altered, restricted or denied – strategies for negotiation.

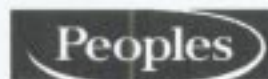
The Council will track the progress of the Task Group as it prepares its mid-point report by February 15, 2005.



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White Pine Restrictions . . . (Continued from page 1)

sions. After a series of conference calls and emails it appears that we have the immediate situation resolved.

- For the period through March 30, Limited Permits and Compliance Agreements will be required to ship and receive pine logs and waste from the regulated areas. The MFS will be contacting all pine processors of record within the next month to assure that those who receive products from the regulated area are covered by the new process.
- For the period, April 1 to June 30, the situation is less certain. APHIS told the MFS that they would not reauthorize the former Compliance Agreements for that period without “further study”. In response, we are proposing to conduct a “proof of concept” demonstration project. All of Maine’s receiving mills and bark processors would be cooperators in the demo project and would be put under compliance agreements similar to those issued last year. The MFS would conduct intensified/enhanced monitoring for PSB at all sites under compliance and provide this data to APHIS. The MFS expect the results to be consistent with monitoring results from previous years (no PSB), which will substantiate the validity of the risk mitigation practices and put this issue to rest.

If APHIS does not accept this proposal, the MFS will need to consider the implications of putting more (or all) of Maine under regulation. This would mean that mills in the regulated area would be able to receive regulated pine materials without restriction (year round). The downside to this approach would be that materials containing pine bark could face the restrictions if they are exported from that portion of the state.

- Any export of pine logs or chips with bark from the regulated area to Massachusetts or New Brunswick would be subject to restriction.
- Also, although we currently have an approved bark management plan that allows Maine companies to export processed bark mulch, if this currently approved management practice were to be disallowed by APHIS, it would have serious repercussions.

The Maine Forest Service will continue to negotiate with APHIS to resolve this situation, and would appreciate industry members’ thoughts and suggestions.

Contact Dave Struble at the Maine Forest Service, (207) 287-4981 or via e-mail: dave.struble@maine.gov.

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Future Forest Economy Project . . . (Continued from page 4)

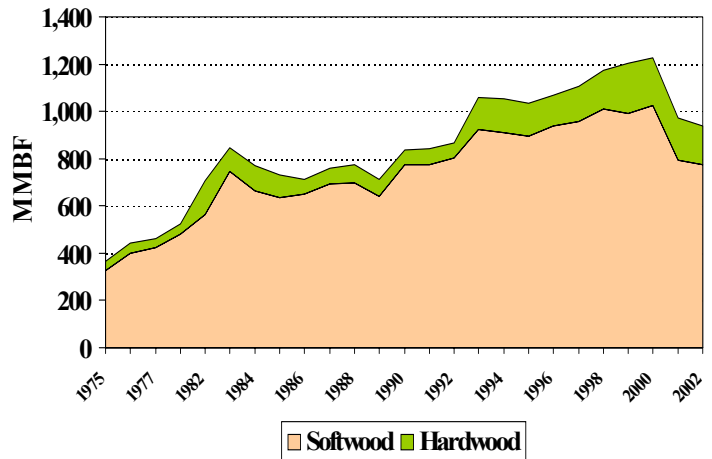
Advisory Committee

A number of professionals representing a cross-section of the state’s forest products, business and research communities served on an advisory committee to offer their insight and experience in the development of the project findings. The report notes that the Advisory Committee members do not necessarily endorse all of the findings and recommendations contained in the report.

The Advisory Committee members are:

- | | |
|-------------------|--------------------------------|
| Deborah Feck | Domtar Industries |
| John Williams | Maine Pulp & Paper Association |
| Bruce Bornstein | Isaacson Lumber |
| Chris Fitzpatrick | Machias Savings & Loan |
| Christine Kraus | Maine WoodNet |
| Jim Robbins | Robbins Lumber |
| Martin Wilke | Eaton Peabody |
| Bruce Bryant | Maine State Senator |
| Habib Dagher | AEWC Center, Univ. of Maine |
| Greg Moore | Pride Manufacturing |
| John Cashwell | Seven Islands Land Company |
| Dan Sosland | Environment Northeast |

In compiling the 350+ page report, principal project researchers Eric Kingsley and Charles Levesque of Innovative Natural Resource Solutions LLC (INRS) enlisted the expertise of several consultants and university researchers from across the country. The draft report, now undergoing review by state officials, Advisory Committee members and key industry representatives, features an exhaustive list of 130 graphs, charts and tables depicting a variety of economic trend data, a thorough discussion of the issues and opportunities facing the industry and closes with



Data Source: U.S. Department of Commerce, Census Division

The graph above, depicting a rising tide of both softwood and hardwood lumber production in Maine, is just one of dozens of revealing statistics that appear in the *Future Forest Economy Report*. Despite the downturn in the last few years, this graph clearly shows that lumber production in Maine has been anything but a “dying industry.”

a tentative list of nineteen *Recommendations for Action*.

As of mid-October, the draft report did not yet include a resource availability study by the Maine Forest Service, a cost curve of oriented strand board mills in North America, and other research. Once this information is included in the final report, some additional recommendations may arise.

The Maine Forest Products Council will devote a considerable portion of a future edition of the *Forest Product News* to the final report when it becomes available.

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Membership News

Pleasant River Lumber Begins Expansion

Pleasant River Lumber Company hosted a groundbreaking ceremony on Monday, October 25 to kickoff the initial phase of a planned three year expansion.

Phase one will involve a new office, new entrance and scales area, and updating of the existing twin-band saw to a new fully optimized sawing line. Work has already begun on each of the projects and the mill expects to be operating with the new sawing line by July of 2005.

Governor Baldacci attended the groundbreaking to announce that Pleasant River Lumber is the first Pine Tree Zone business in Piscataquis County. The Governor spoke of how pleased he was that the first Pine Tree designation in the area was for a business owned and operated by a Maine family. He addressed how important programs such as Pine Tree are to the economic stability and growth of northern Maine. Also in attendance were various members of local and state government, as well as representatives of Senator Collins, Senator Snowe, and Congressman Michaud.

Pleasant River Lumber Company is a spruce/fir dimension mill that was acquired by the Brochu family of Stratton, and Rodney Irish of Freeport from Gerald Crete and Fils of Quebec on June 1st of 2004. The Brochu family has 25 years experience in the softwood lumber industry as owner/operators of Stratton Lumber Company in Stratton, ME. In August of this year, the Brochus sold their interest in Stratton Lumber to Fontaine Inc. of Woburn, Quebec, now known as the Fontaine Group. The sale marked the end of a 25 year partnership that contributed greatly to the success of each family. The Brochu family will now focus all of their energies on modernizing Pleasant River Lumber



Groundbreaking Event: (L to R) Dover-Foxcroft Town Manager Jack Clukey, Luke Brochu, Governor Baldacci, Jasen Brochu and Chris Brochu gather to announce Pleasant River's expansion project.

Company. The family has great confidence in the workforce and the community as a whole to contribute to the success of this mill. Members of the family include: Luke Brochu, Guy Brochu, Chris Brochu, Jason Brochu, and Adrien Brochu. The final partner, Rodney Irish, is a CPA from the Portland area.

The owners of Pleasant River Lumber are grateful to the Governor and all attendees of the ceremony. They also wish to acknowledge the loggers, landowners, and all other members of the forest products industry for their valued support over the years.

Due to a text glitch in our last issue, we would like to again thank our 2004 Golf Tournament Hole Sponsors:

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**The annual golf tournament
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**Look for more details in future editions
of the Forest Products News**