President Trump's Executive Orders Concerning the **United States Forest Sector**

DOVETAIL PARTNERS' OPINIONS

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INTRODUCTION

In March 2025 United States President Donald Trump issued two executive orders (EOs) affecting the forest sector worldwide. EO 14225,"Immediate Expansion of American Timber Production,"[1] aims broadly to increase harvests on national forests. EO 14223, "Addressing the threat to national security from imports of timber, lumber and their derivative products"[2] aims at reducing imports of wood and paper products. These two EOs have proponents and opponents within and outside the forest sector, depending on impacts on diverse constituencies. The EOs cover various issues and make claims and directives for timely action by secretaries of four government agencies.

In this opinion piece, Dovetail Partners considers the impacts on the US forest sector and its trading partners. We analyze some of the EOs' salient features and in considering the divergent viewpoints of those parties impacted, we offer our opinions. Overall the EOs and tariffs on wood and paper trade have created tremendous uncertainty in the global forest sector.

Could you answer the question, "what is an Executive Order?" It has likely been a commonly "googled" question in recent months. Perhaps not as common as "What is AI?" The AI generated definition of an Executive Order (EO) when typed into Google is: *An executive order is a directive issued by the President of the United States that has the force of law, primarily used to manage the operations of the federal government and direct federal agencies. It does not require Congressional approval and can be overturned by a later President.*

EOs do not create laws, rescind, or revise laws (this is stated at the end of every EO); they are an order to the government to ensure laws are faithfully executed. The power to ensure "laws be faithfully executed" is granted to the executive branch through Article II of the Constitution. The substance of EOs is incredibly varied, as is the impact they have on the American public. President Obama signed an EO to change the Peace Corp logo to appeal to millennials, and President Trump's EOs from his first term included a deregulatory order related to water pressure in showerheads. It's likely neither of those made front page news. And then there is the EO that is taught in every 5th grade history class - President Lincoln's Emancipation Proclamation. Some presidents have signed less than 10 EOs, while Franklin D. Roosevelt's total is 3,726 (he served four terms, 1933-1945).

The past several administrations have issued, or rescinded, EOs that impact trade, climate change, energy, and the environment. Both Trump and Biden, and Trump again, have specifically signed EOs related to our national forests and the forest sector.

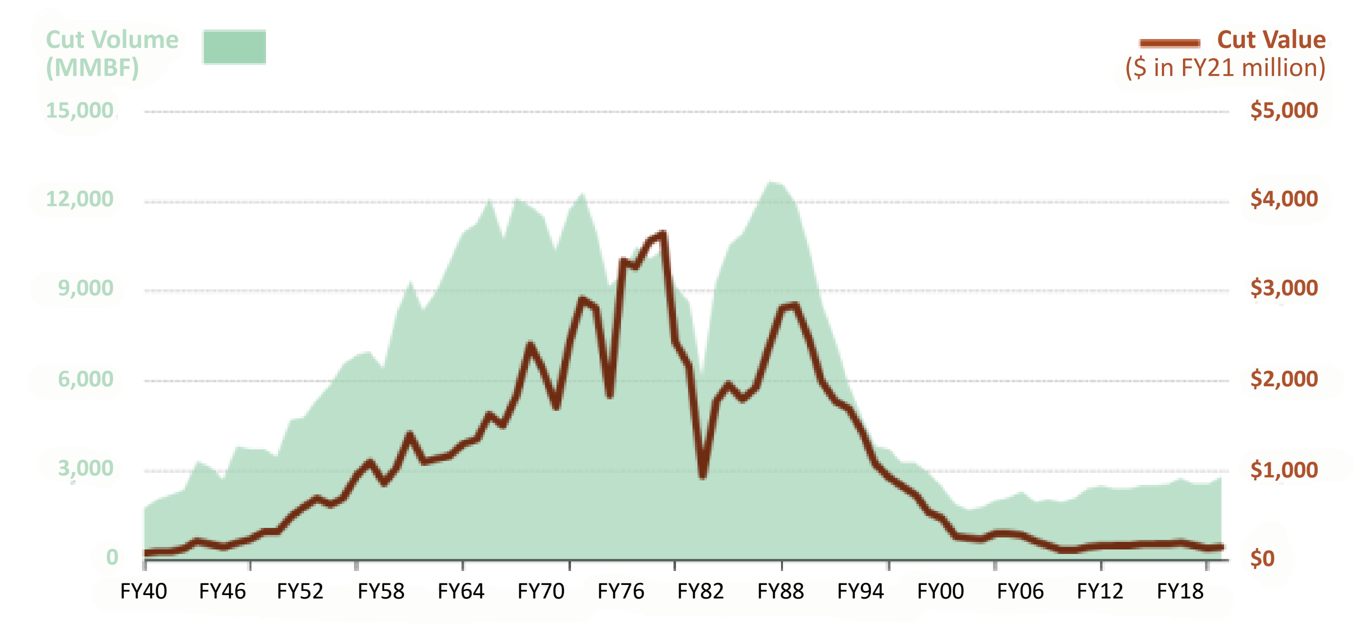
1 EO 14225. 2025. Available at: www.govinfo.gov/content/pkg/DCPD-202500316/pdf/DCPD-202500316.pdf

2 EO 14223. 2025. Available at: www.govinfo.gov/content/pkg/DCPD-202500314/pdf/DCPD-202500314.pdf

EO 14225, IMMEDIATE EXPANSION OF AMERICAN TIMBER PRODUCTION

The first section of EO 14225, “Purpose,” states that the US’ abundant timber resource is “more than adequate” to meet domestic needs. The forests of the US are 40% publicly and 60% privately owned.[3] The USDA Forest Service’s National Forests (NFs) are indeed an abundant resource. Harvests on national forests have declined drastically since a peak in 1988 (Graph 1).

Graph 1. Annual harvest volumes and values on National Forest System land, 1940-2021



Notes: MMBF is million board feet. Value deflated to fiscal year 2021.
Source: USDA Forest Service, 2022 [4]

At their peak, NFs supplied approximately 13% of total US harvests, the rest coming from public and private (including lands managed by Tribal Nations) and other public lands. In 2011, the NFs supplied only 2% of US harvests.[5] The decrease is due to interrelated factors including biological (e.g. protection of the northern spotted owl), administrative, legal challenges, and market conditions.

The EO’s second section clarifies that increased harvests are to come from federally managed forests, specifically the NFs, plus those of the Bureau of Land Management (BLM). From a strictly timber resource standpoint, this is possible since the NFs are well-stocked overall. However, from a practical standpoint there are many constraints. If only a few percent of the nation’s harvests come from NFs, then the preponderance comes from other private and public (e.g. state-owned) forestlands. These other landowners, and their buyers, e.g. sawmills and pulp mills, are dependent on revenues and supplies respectively. Since the pre-1990s peaks in NF harvests, those industries and communities dependent on those harvests have adapted (downsized or closed) accordingly.

3 Who owns America’s forests?. 2025. Available at https://www.stateforesters.org/timber-assurance/legality/forest-ownership-statistics/

4 Timber harvesting on federal lands. 2022. Data from US Forest Service. Available at: www.fs.fed.us/forestmanagement/products/cut-sold/index.shtml.

5 Congressional Research Service. 2022. Available at https://www.congress.gov/crs-product/R45688

The proposal to increase harvests on federal lands is possible, but is it feasible? There are immediate and long-term constraints and consequences. Increased timber production from NFs would need to be absorbed by existing logging, trucking, primary processing, and manufacturing industries or new industries with skilled labor would need to be created. For existing industries, their current suppliers could be negatively impacted or perhaps the manufacturer could expand to process the new supply – given that they had an increased market for their higher production. Increased harvests on public lands would have multiple impacts beyond timber supply. NFs are often multiple use, meaning harvests would affect ecosystems, wildlife, recreation, watersheds, biodiversity, soil health, etc. Also the EO will not address the challenges facing the forest sector in the eastern US where NFs exist but private lands dominate forest ownership. The currently reduced FS workforce and production infrastructure would also likely limit actual production increases.

The EO includes these requirements and their deadlines:

Deadline 2025	Requirement
31 April	Secretaries of the Interior and Agriculture to submit guidance and legislative proposals on increasing harvests
1 May	Secretaries of Interior and Commerce to report on measures to streamline the requirements of the Endangered Species Act
1 June	Set target for NF and BLM harvests in MMBF
1 July	Establish exclusions to National Environmental Policy Act
1 Sept	Complete the Whitebark Pine Rangewide Programmatic Consultation
15 Dec	Establish exclusion for timber thinning and salvage activities

Meeting more of our domestic wood demand with domestic timber is a good idea. It would have many far-reaching positive effects, including economic revitalization in rural communities, wildfire fuels reduction, salvage and use of fire-burned or beetle-killed timber, restoration, recreational access enhancements, and so much more. And, indeed, national forests and BLM lands could conceivably be managed and leveraged to do more to help supply domestic wood.

But while it may indeed be a reasonable and good intent, there is no guarantee that it will have the intended effect. Given it requires the agencies to create categorical exclusions for timber sales under National Environmental Policy Act (NEPA) and to use emergency regulations of the Endangered Species Act to find ways to accelerate approval of timber harvests, the most likely immediate outcome would be a crush of litigation challenging the legality and creating further delays.

What forest products business owner will bank on any such changes until the RFPs and timber sale prospecti actually emerge, well after the legal dust settles, if it ever does? For multiple reasons, approximately 12% of USFS timber sales do not even receive a bid.[6] These businesses are long-term ventures and operations and these directives may only be in the short term. The lack of long-term policy stability and predictability makes it difficult and even unlikely for businesses to justify significant capital investments in new mills or increased processing capacity in existing facilities, already struggling to survive in the face of historic contractions in the sector. Increased extraction requires more labor from foresters to loggers to mill workers – the sector already had a shortage before forced layoffs of USFS and BLM employees. The forest sector has a continuing challenge to attract and maintain workers.[7]

The EO aims at streamlining the current administrative requirements for timber harvesting. Those requirements were established to ensure sustainable forest management for multiple resources. Environmental NGOs have raised the alarm about the means to increase harvests by reducing restrictions by the Endangered Species Act and the National Environmental Policy Act. While there is opposition to this EO from NGOs and others in the forest sector, there are also proponents of increased federal forestland harvests, e.g. the American Forest Council, an association of mainly western forest-based industries.

BOTTOM LINE ON EO 14225

EO 14225 “Immediate Expansion of American Timber Production” does not actually address the ongoing challenges in the forestry sector (and rural communities) that have led to its contraction. Diminished timber supply from historic highs and uncertainty in a changing world are certainly in the mix of reasons for the steady decline in American wood production, but it is far more complex and requires a more coherent and comprehensive set of policy solutions that get at root causes such as loss of workforce, transportation challenges, high costs of energy, and diminished domestic demand for and use of locally-sourced wood products.

6 Why some timber doesn’t get sold. 2024. www.research.fs.usda.gov/srs/articles/why-some-timber-doesnt-get-sold

7 Barriers to recruitment and retention federal wildland firefighters. 2022. Available at: www.gao.gov/assets/gao-23-105517.pdf

EO 14223, ADDRESSING THE THREAT TO NATIONAL SECURITY FROM IMPORTS OF TIMBER, LUMBER AND THEIR DERIVATIVE PRODUCTS

The second EO, 14223, issued on 1 March 2025, "Addressing the threat to national security from imports of timber, lumber and their derivative products", aims at protecting the US forest products industry from imports. Imports are termed "threats to national security" and applicable legislation is cited. The Secretary of Commerce is ordered to report to President Trump within 270 days, i.e. by 26 November 2025, about "the effects on the national security of imports of timber, lumber, and their derivative products".

EO 14223, directed at ensuring national security, has created tremendous insecurity in the international commerce of wood and paper products. At the time of this writing the required report from the Secretary of Commerce has not yet been issued. But in April 2025, without waiting, the President ordered enormous general tariffs on trading partners (countries), which destabilized established trade channels and evoked countervailing duties by those same trading partners. Tariffs are taxes that are paid to the government by the US-based importing company. The additional costs of tariffed goods are typically passed on to the consumer via price increases. The size of the initial tariffs were sometimes reduced through bilateral negotiations. Theoretically, tariffs could lead US-based companies to negotiate lower prices with their international suppliers to offset their end cost, or look for domestic suppliers or suppliers from countries with lower tariffs.

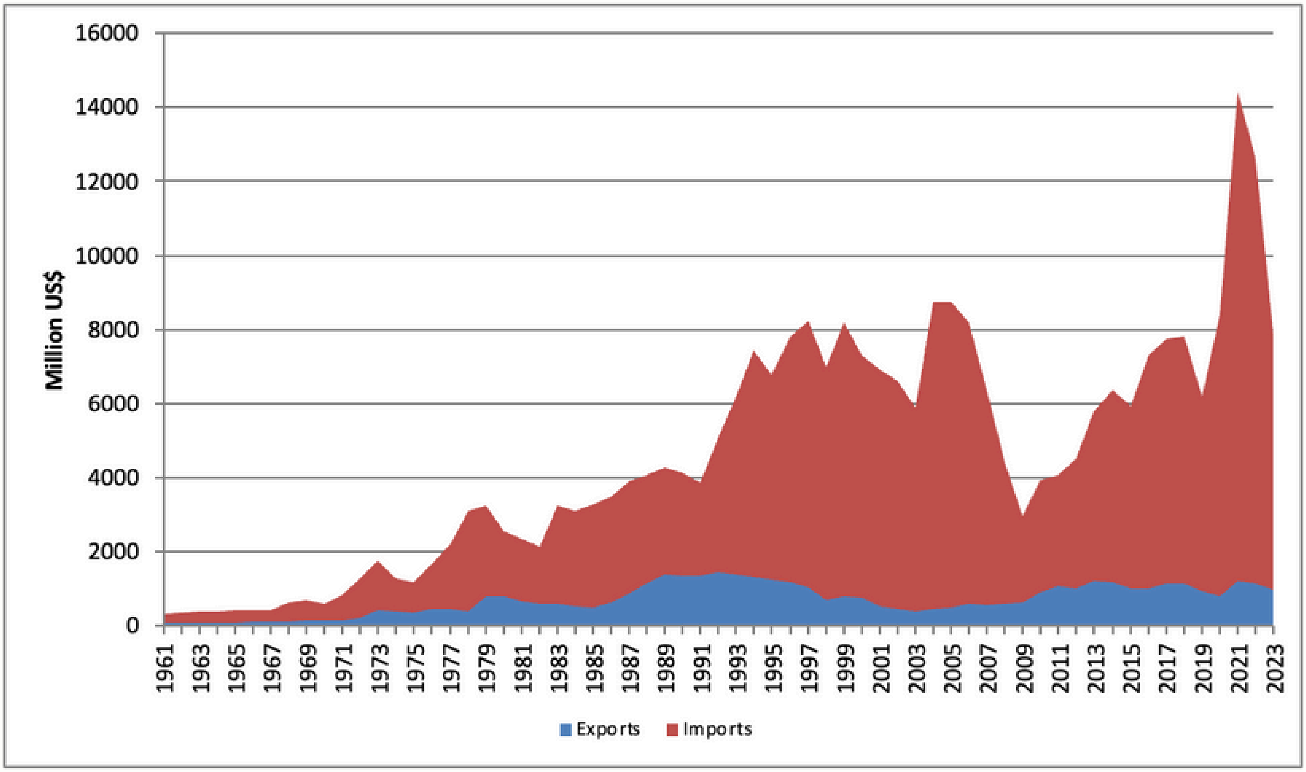
The tariffs on countries' exports (including wood products, plus most other products exported, however with some exceptions, e.g. crude oil) ranged from a base minimum of 10% to an astounding 145% (for China). Following the announcement of the tariffs, they were struck down by the US Court of International Trade in May 2025. Then in June the US Court of Appeals issued a hold on the USCIT judgement. The case will be decided in the US Supreme Court later in 2025. Tariffs were to go into effect in July 2025, but then were postponed until 7 August 2025. In August 2025 the tariffs were still astonishing for some countries, for example Canada, which is the US' major trading partner for softwood lumber. The legal battles over the tariffs and trading partners' counter measures will continue within the US and probably will be raised to the World Trade Organization.

The US tariffs on Canadian wood imports have been contentious for decades, but the new proposed tariffs of 35% will raise the cost of home construction in the US by $10,900 per home according to the National Association of Home Builders.[8] In mid-2025 the US housing market, a major consumer of construction wood and furnishings, was at a 9-year low. It seems that the initial high tariffs were to attract trade discussions and some countries negotiated lower tariffs with the President. In short, the continued uncertainty and the impossibility for domestic and international companies to plan during what has been termed a "trade war."

8 NAHB members cite impact of tariff uncertainty on home building. 2025. Available at: www.nahb.org/blog/2025/05/tariff-uncertainty-impact-on-home-building

The EO states correctly that the US is a net importer of softwood lumber – it has been since 1961 (first available statistics) (Graph 2). Why? Because the US construction of housing and many other buildings is mainly from softwood lumber. The US has never had the production capacity in the last 75 years to furnish all of its softwood lumber needs, and it certainly cannot in the short term. Thus to meet domestic demand for practical and economic reasons to supply its building needs, the US must import softwood lumber. The US was forecast to produce two-thirds (66%) of its consumption of softwood lumber in 2025 – it imported the other third of its demand for softwood lumber. [9]

Graph 2. US trade of softwood lumber, 1961-2023

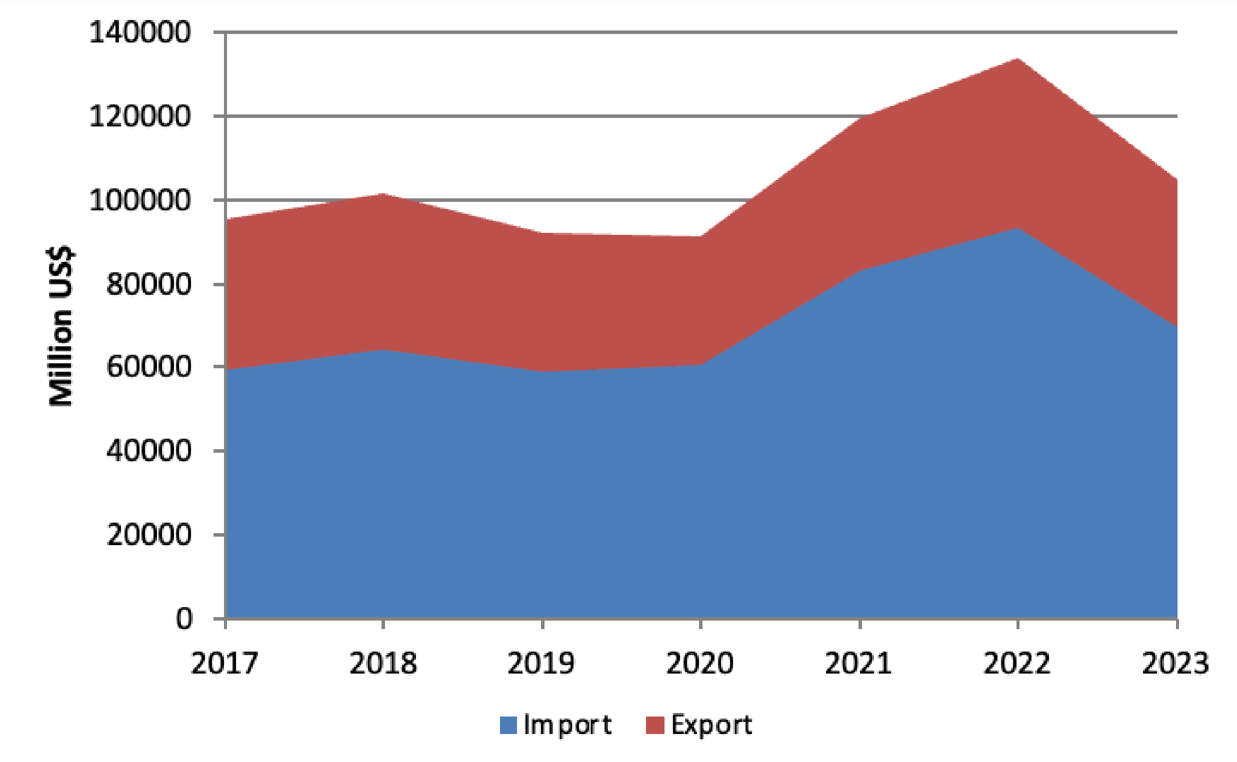


Source: UN FAO, Faostat, 2025.

9 Alderman, D. and C. Brandeis. 2024. United States Forest Products Annual Market Review and Prospects: Country Market Report, 2022-2026. Available at: https://unece.org/sites/default/files/2024-10/US_FPMAR_2024-2025.pdf

US imports of softwood lumber constituted only 10% of the total US imports of wood and paper products in 2023. The focus of the EO on softwood lumber neglects the imports of most wood and paper products. When other products are included, for example value-added wood products such as furniture, then the US has a more positive balance of trade (although still negative) (Graph 3). The Secretary of Commerce is directed to report on the effects on national security on derived products too. Wood pulp could be termed a derived product since it can be a byproduct of producing lumber. Canada is the major source of some pulp varieties for tissue paper products and its tariffs are expected to be felt by US importers/manufacturers, and by US consumers.

Graph 3. US trade of wood and paper products, 2017-2023.



Source: UN FAO, Faostat, 2025.

Tropical exporters to the US were hit with unequal tariffs, which have disrupted traditional trade. For example, the US is Viet Nam's major market for its wood-based products including furniture, plywood, millwork and handicrafts. In 2024, it exported US$9 billion of wood and wood products to the US, a 24% increase over 2023. Viet Nam imported US$316 million of wood and wood products from the US in 2024, mainly primary-processed products of lumber, logs and veneer. Hit with 46% general tariffs, exports to the US will halt for some products and will be more expensive for US consumers for other products. Other tropical furniture exports hit with lower tariffs, for example Malaysia at 24%, hope to capitalize on the unstable trade situation.[10]

10 International Tropical Timber Organization. Tropical Timber Market Report, V. 29, No. 12, 16-30 June 2025.

There are US proponents of higher tariffs to restrict wood products imports, e.g. the US Lumber Coalition. The Coalition wants to replace imports with domestic production; however, this is unrealistic in the short term. Some imported species and products are not available from US forests. In contrast, opponents to these tariffs include organizations such as the National Association of Home Builders that oppose tariffs and duties because they raise builders' costs and home prices, thereby reducing residential as well as commercial and industrial construction.

BOTTOM LINE ON EO 14223

In conclusion, the EO 14223 "Addressing the threat to national security from imports of timber, lumber and their derivative products" has created tremendous uncertainty in the global timber trade. It is difficult to comprehend how timber imports threaten national security, however it is evident that even before the forthcoming report by the Secretary of Commerce that the tariffs already imposed on trading partners is causing insecurity for US suppliers, US exporters (via countervailing duties), US manufacturers and the entire wood supply chain to greater or lesser extent. The US is, and always will be, dependent on foreign-made wood products, especially for species unavailable domestically, and for affordable products. The consequences of this EO will be to raise prices for US consumers, which would be more profitable for US manufacturers. This is evident in the decades-long softwood lumber dispute between the US and Canada, which has driven up lumber prices artificially. The EO is short-sighted and it will have considerable market and trade impacts.

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