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# Forest Products News from . . .

# The Beck Group

“If I had asked people what they wanted, they would have said faster horses.”

Henry Ford

## The Next Generation at The Beck Group



More than 33 years after founding The Beck Group, Tom Beck is stepping down from his role as President of the firm. Taking his place as President is Tom’s son, Bryan Beck. The changes were effective August 2014.

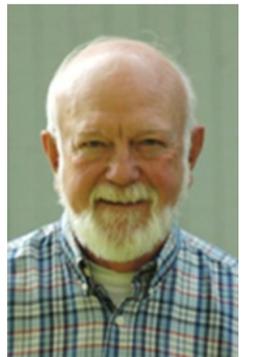
Bryan, like Tom, is a graduate of the Forest Products program at Oregon State University. After graduating, Bryan spent several years working in sawmills and the construction industry before joining the firm in 2003. Since then Bryan has been involved in, and led, projects that cover the full range of services offered by the firm. His particular areas of focus, however, have been capital project planning, log procurement planning, benchmarking studies, business appraisals, feasibility studies, and merger and acquisition due diligence.

Tom will continue to be involved in the firm’s business as Chairman, where his role will shift more to strategic oversight and business development. Tom also expects to spend more (long-awaited) time with his wife, Harriet, on their Christmas tree farm on the outskirts of

Portland – as well as more time fishing in his boat!

Another change occurring as part of this transition is Roy Anderson moving to Vice President of the firm from his position of Senior Consultant. Roy has been with The Beck Group since 2006. He started his forestry and forest products career in Wisconsin, but eventually returned to graduate school at Oregon State University. Since joining the firm, Roy has been involved in all types of projects and services offered by The Beck Group, but he has focused heavily on biomass utilization projects, timber and fiber supply, and business feasibility.

Bryan and Roy both look forward to their new roles. Both are eager to continue building on the firm’s strong foundation of service to the forest products industry and its associated stakeholders. And they both want all of The Beck Group’s clients to know that the firm will continue to offer the same services, and more importantly, will continue delivering the same professional, high-quality information and advice that has become the trademark of The Beck Group.



Tom Beck — Chairman



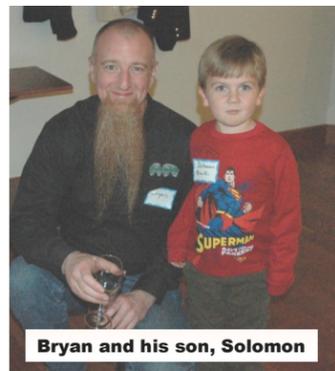
Bryan Beck — President



Roy Anderson—Vice President

## Party Time!

The Beck Group hosted a party to celebrate the promotion of Bryan Beck to President and Roy Anderson to Vice President of The Beck Group. About 75 family, friends, and colleagues joined together and had a great time in the Mount Hood Room at the World Forestry Center in Portland, OR.



Bryan and his son, Solomon



Kathleen Stewart, her husband, Steve, and daughter Lauren



Bryan explaining what we do at The Beck Group



Roy's daughter, Willa



Tom Beck



Roy and his Mom, Marianne (who is showing off her Green Bay Packer tattoo!)

# Remembering Bill Mitchell

The Beck Group sadly lost our long-time friend, and colleague, Bill Mitchell. He passed away on Saturday, May 10th following a heart attack.

Bill had been with our company for over 28 years and had worked in the forest products industry for more than 35 years. In that time, he touched many lives and contributed to the success of too many people and operations to count.

Prior to coming to work as a consultant with Tom Beck, Bill worked in sawmill and plywood operations, including positions at International Paper, Weyerhaeuser, and Roseburg Forest Products.

As a consultant, Bill was responsible for projects concerning both primary and secondary wood products manufacturing, including benchmarking studies, feasibility studies, marketing research, due diligence evaluations, plant operational



assessments, timber resource studies, and profit improvement projects. In recent years, Bill was most widely known as the chief recruiter for our industry benchmarking studies (and master joke-teller at our management training workshops).

Bill was a caring and considerate man who placed great importance on his family and on his relationships with clients and co-workers. Bill was very positive and could always be counted on for a compliment, an encouraging word, a joke, or to look for the silver lining on a looming cloud. He will be greatly missed. by our team — on both personal and professional levels.

Bill is survived by his wife Lorraine, five children, and numerous grandchildren.

## THE BECK GROUP

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# BECK Projects Update

## Beck Group Competitive Assessment Update

The following list summarizes BECK staff members' recent activities on competitive assessment and benchmarking studies for different segments of the forest products industry. If you are interested in learning more about any of these studies, please let us know.

### Recently Completed

**Western U.S. Dimension Lumber** – Our firm completed a comprehensive benchmarking study for producers of dimension/random length lumber in the Western United States. It included a total of 13 operations from Oregon, Washington, Idaho, and California. The study period was calendar year 2013. The majority of operations were profitable during this period as opposed to the previous study, covering mid-2010 to mid-2011, when the average mill was substantially “in the red”.

### Under Development

**Southern Pine Lumber** – The next competitive assessment study covering producers of Southern yellow pine lumber is expected to kick off shortly after the first of the year and will cover calendar year 2014.

## Other Beck Group Project Activities

**Sawmill Assessment** – Our staff completed an assessment of an Eastern Canadian sawmill operation, including benchmarking comparisons of key financial and operating metrics and an on-site audit. Opportunities for both low cost/no cost operating improvements and capital projects were identified.

**Biomass Cogeneration Feasibility Study** – BECK staff worked with our associate, Bill Carlson, to analyze the feasibility of developing a biomass heat and power facility at Central Washington University in Ellensburg, Washington. Along with technical and financial feasibility assessment, carbon footprint reduction analysis was completed.

**Due Diligence Analysis** – Our firm assisted a client interested in acquiring a wood preservative chemical supplier. The project included analysis of the U.S. lumber treating business and interviews with a variety of treating industry personnel.

**Sawmill Restart Feasibility Analysis** – BECK partnered with an engineering firm to develop capital cost estimates and determine the financial feasibility of restarting a Southern yellow pine sawmill that has been idled for several years, including modifications to the process flow and some machinery upgrades.

**Benchmarking Data Analysis** – A participant in recent Southern yellow pine lumber benchmarking studies retained our firm to assist with some in-depth analysis of competitive assessment data, with the goal of developing target performance metrics for its sawmills.

**Biomass Fiber Supply Study** – BECK staff analyzed the available volume and delivered cost of biomass fuel for a planned biomass heat and power (cogeneration) plant in the Inland U.S. West. Two different sizes of plants, with varying fuel types (sawmill residuals, logging slash, urban wood waste, and roundwood), were considered.

**Siting Assistance and Fiber Supply Study** – As the first phase of a larger feasibility study, our firm assisted an off-shore manufacturer that has developed a novel engineered wood product to identify optimal regions of North America in terms of available sites for developing a manufacturing facility, availability of raw material supply, and raw material delivered cost.

**Business Plan Validation** – BECK staff reviewed and validated the financial projections and business plans of a project developer aiming to construct an integrated biomass facility (i.e., cogeneration, sawmill, and pellet manufacturing all at one site).

## BECK Management Training Workshops Planned for 2015

### Sawmilling

Thanks to the industry's strong support of our sawmill management training workshops that were held in early 2014 in Myrtle Beach, SC and Portland, OR, The Beck Group is planning to offer two more sawmill management training workshops in 2015. We will again offer a workshop in the Western U.S. and another in the Southeastern U.S. Locations and dates for 2015 have yet to be determined, but we expect to do a South workshop in the spring and a West workshop in the fall.

### Plywood and Veneer

This past summer and fall, The Beck Group developed a curriculum for a plywood and veneer manufacturer management training workshop. As some of our clients know, we began doing some planning for hosting a workshop in Portland, OR in the fall of 2014. There was good interest and support from the industry, but we simply became too busy on other project work to devote the amount of time needed to put on a high quality workshop. As a result we postponed the workshop, but plan to offer it in 2015.

