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[Weyerhaeuser Presentation - May 1993] [Loose]

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WEYERHAEUSER PRESENTATION MAY 1993

A. Introduction to Weyerhaeuser

1. We Want to be Part of the Solution.
2. Weyerhaeuser is a Diverse Company in a Diverse Industry.
3. Weyerhaeuser is Unique in Its History and Commitment to the Northwest.
   - Employment: 13,938
   - Largest landowner: 2.7 million acres
   - Investment: $1.2 billion over the last 5 years

B. Federal Timber and Chip Supply

1. A Stable Federal Timber Policy is Vital to a Healthy Industry.
2. We Support Re-establishment of a Certain and Predictable Supply of Timber From Federal Lands.

C. Private Forestland Management

1. Public Policy Should Encourage and Support Tree Growing on Private Forestlands.
2. Forest Practices Have Evolved and Are Evolving Due to Public Needs and Demands.
   - We have supported Washington's and Oregon's rigorous forest practice laws as they have evolved over time.
3. Private Land is Heavily Impacted by the Owl.
4. We Have Experience With Owl and Wildlife Research.
5. We Pledge Our Support to a Comprehensive Solution that Moves Away From a Species-by-Species Approach.
6. What is the Role for Private Lands in a Comprehensive Solution?
   - Growing and harvesting of trees
   - Soil productivity
   - Habitat for wildlife species dependent on younger forests
   - Aquatic habitat (including fish)
   - Complement public lands managers in protecting old-growth-dependent species

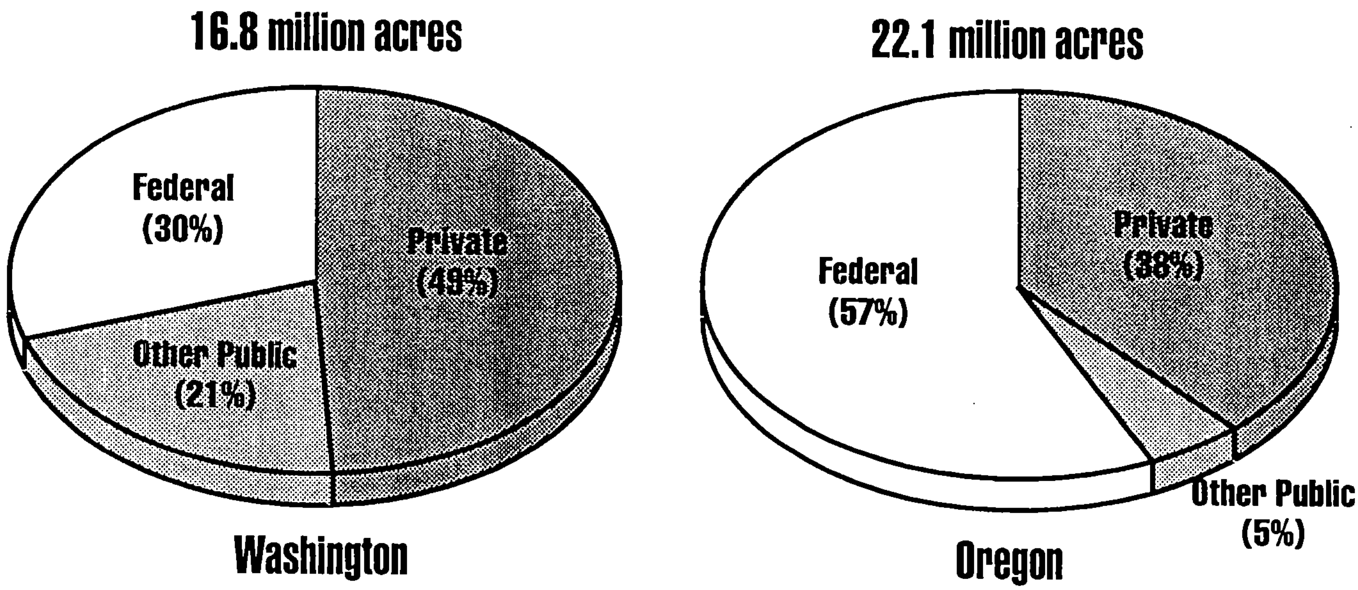
(See other side)

7. We Commit to Cooperation With the Administration to Make a Program Work
8. In Order to Invest, Private Forestland Owners Must Have Confidence in a Stable Regulatory Environment.

D. World Trade — Access to All Markets

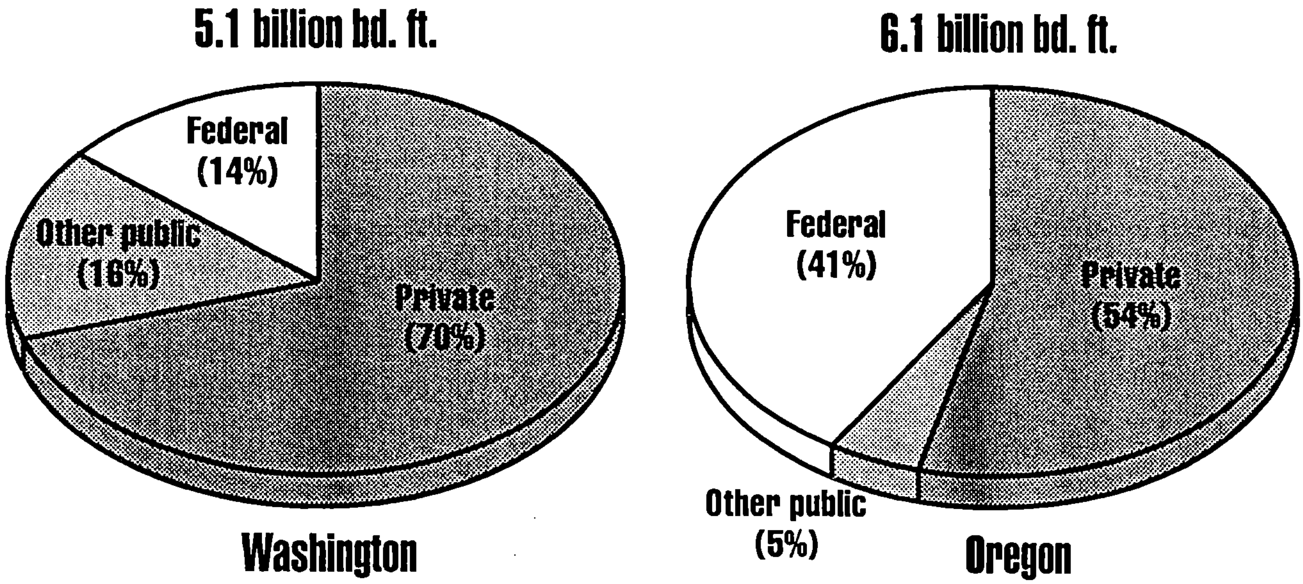
1. Log Exports are Second Growth From Private Lands Primarily in Washington.
2. We Support Alternatives to FSC Benefits for Logs that Enhance Incentives for Trade and Tree Growing.
3. International Trade is Critical for all U.S Regions but Especially for the Pacific Northwest.
4. The Future of the Forest Products Industry and its Jobs Lies With Companies that Look Globally.
5. Log Exports Have Helped Open Foreign Markets.
   - Today, 75% of Weyerhaeuser exports are manufactured products.
6. Exports Give Us Confidence to Re-invest in Forestland and Manufacturing Facilities.

Timberland Ownership



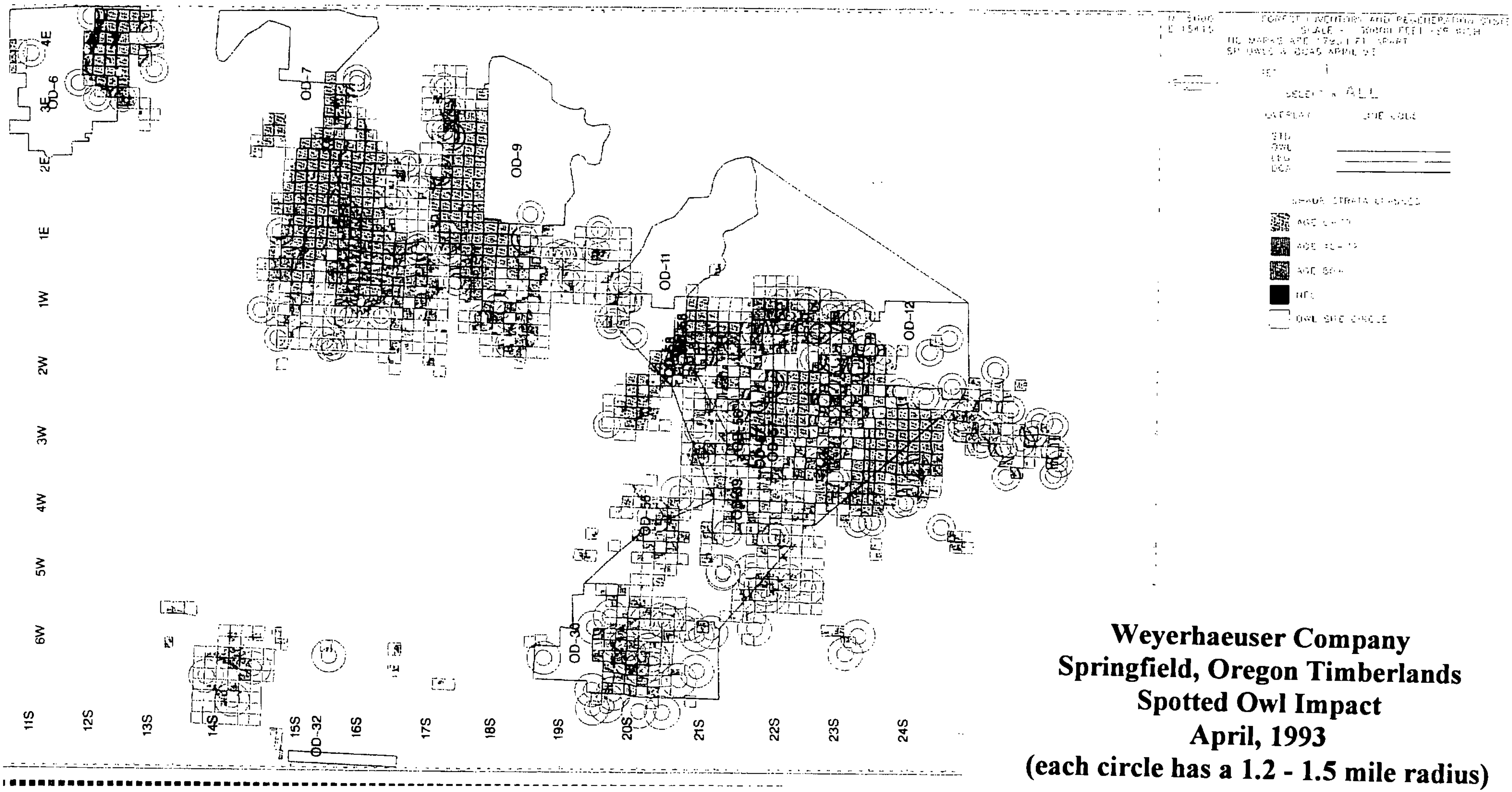
Source: Forest statistics, U.S. Forest Service, U.S. Department of Agriculture PNW-RB 168

Total Statewide Harvest — 1991

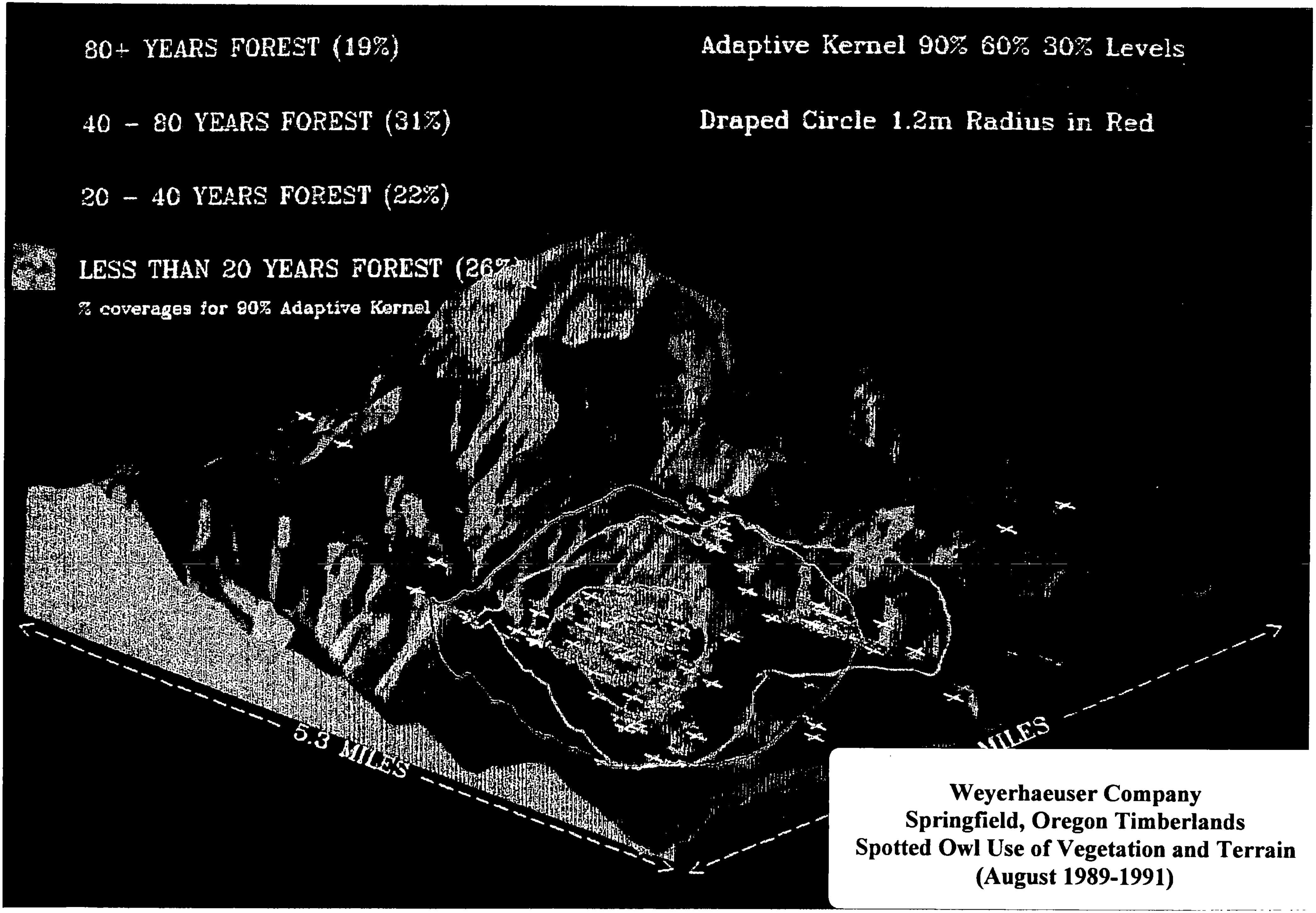


Note: 1992 Statistics currently unavailable

Source: State reports

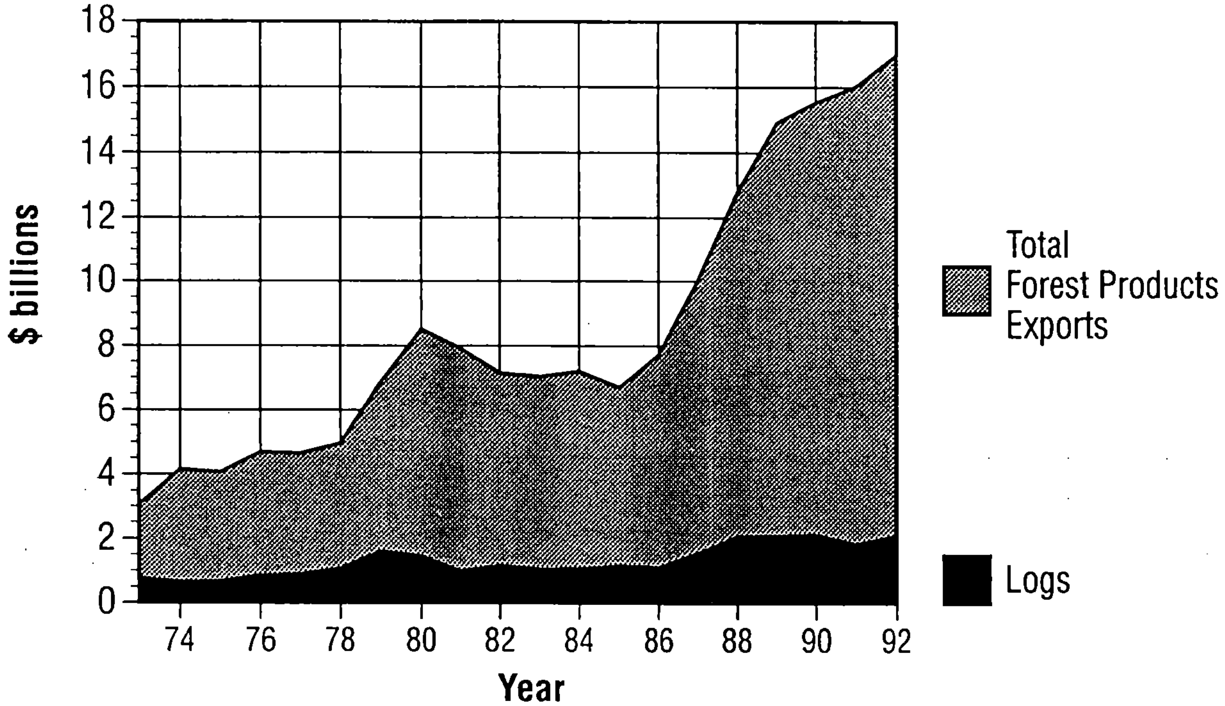


Weyerhaeuser Company
Springfield, Oregon Timberlands
Spotted Owl Impact
April, 1993
(each circle has a 1.2 - 1.5 mile radius)



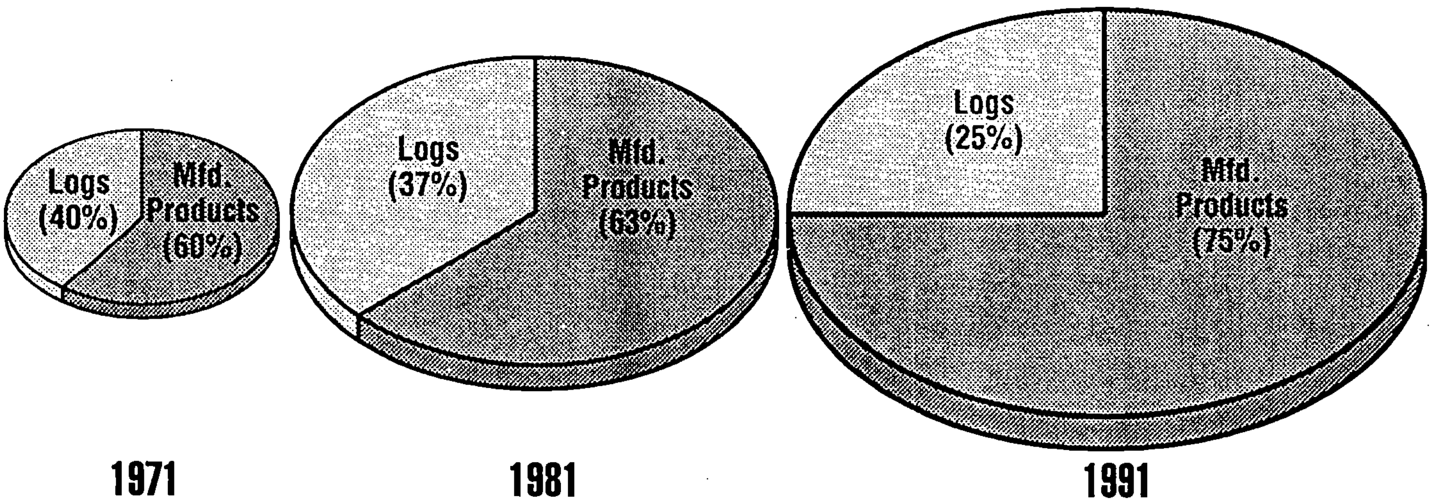
Weyerhaeuser Company
Springfield, Oregon Timberlands
Spotted Owl Use of Vegetation and Terrain
(August 1989-1991)

U.S. Forest Products Exports
Total vs. Logs



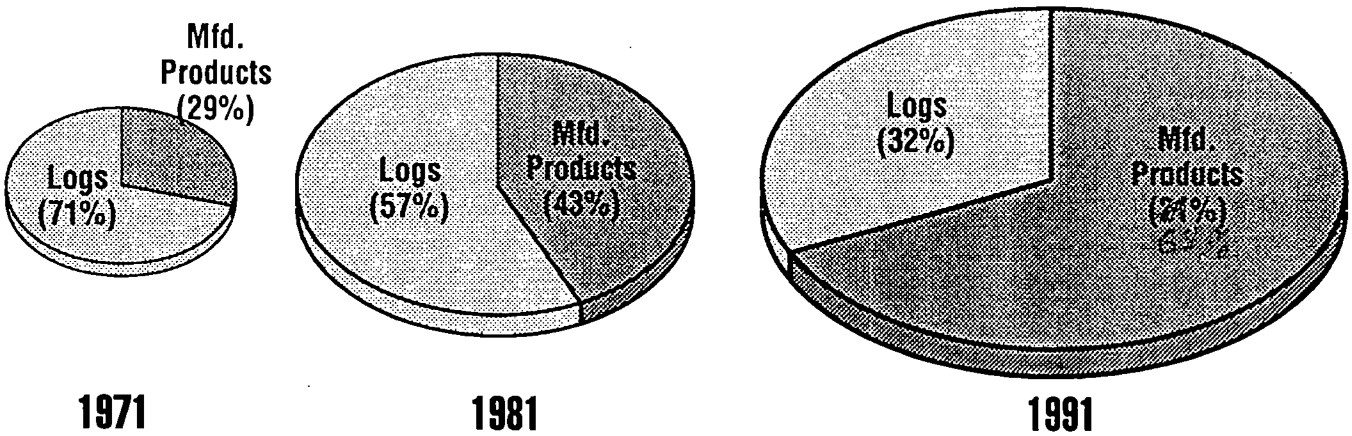
Sources: Warren, Debra D., *Production, Prices, Employment and Trade in Northwest Forest Industries*; and U.S. Department of Commerce

Total Weyerhaeuser Company Exports From the U.S. (to all countries)



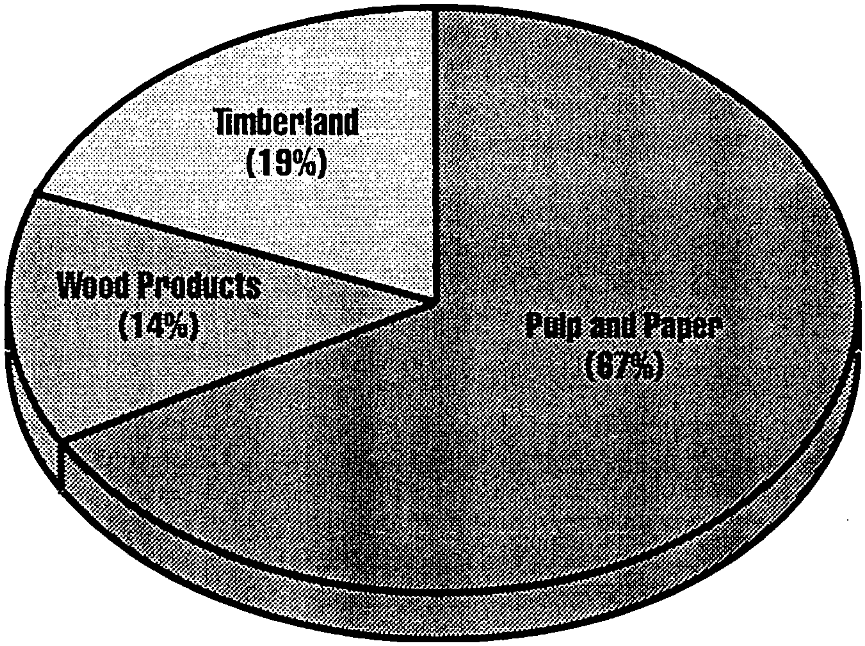
	1971	1981	1991
Manufactured Products	$104	$598	$1159
Logs	$70	$348	$391
Total ($MM)	$174	$946	$1550

Total Weyerhaeuser Company Exports From the U.S. to Japan

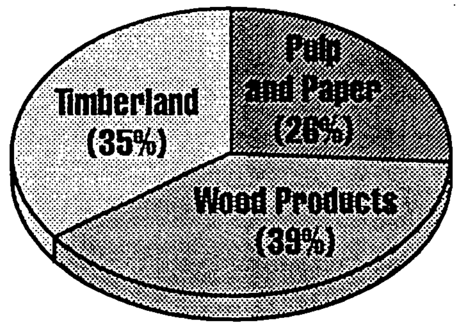


	1971	1981	1991
Manufactured Products	$27	$227	$606
Logs	$66	$298	$281
Total ($MM)	$93	$525	$887

Weyerhaeuser Company Investments
1988-1992



Washington



Oregon

	Pulp and Paper	Wood Products	Timberland	Total
Washington	$659.3	$142.1	$189.3	$990.7
Oregon	$77.3	$118.6	$106.0	$301.9
Total ($MM)	$736.6	$260.7	295.3	$1292.6