2012 FLORIDA FORESTRY ECONOMIC HIGHLIGHTS

Economic Output:

Florida's 15.4 million acres of timberlands supported economic activities which generated **$16.37 billion** in total output impacts in 2012. This was a 16% increase compared to 2011, and 20% more than in 2008 at the lowest point in the recent economic recession (Fig. 1).

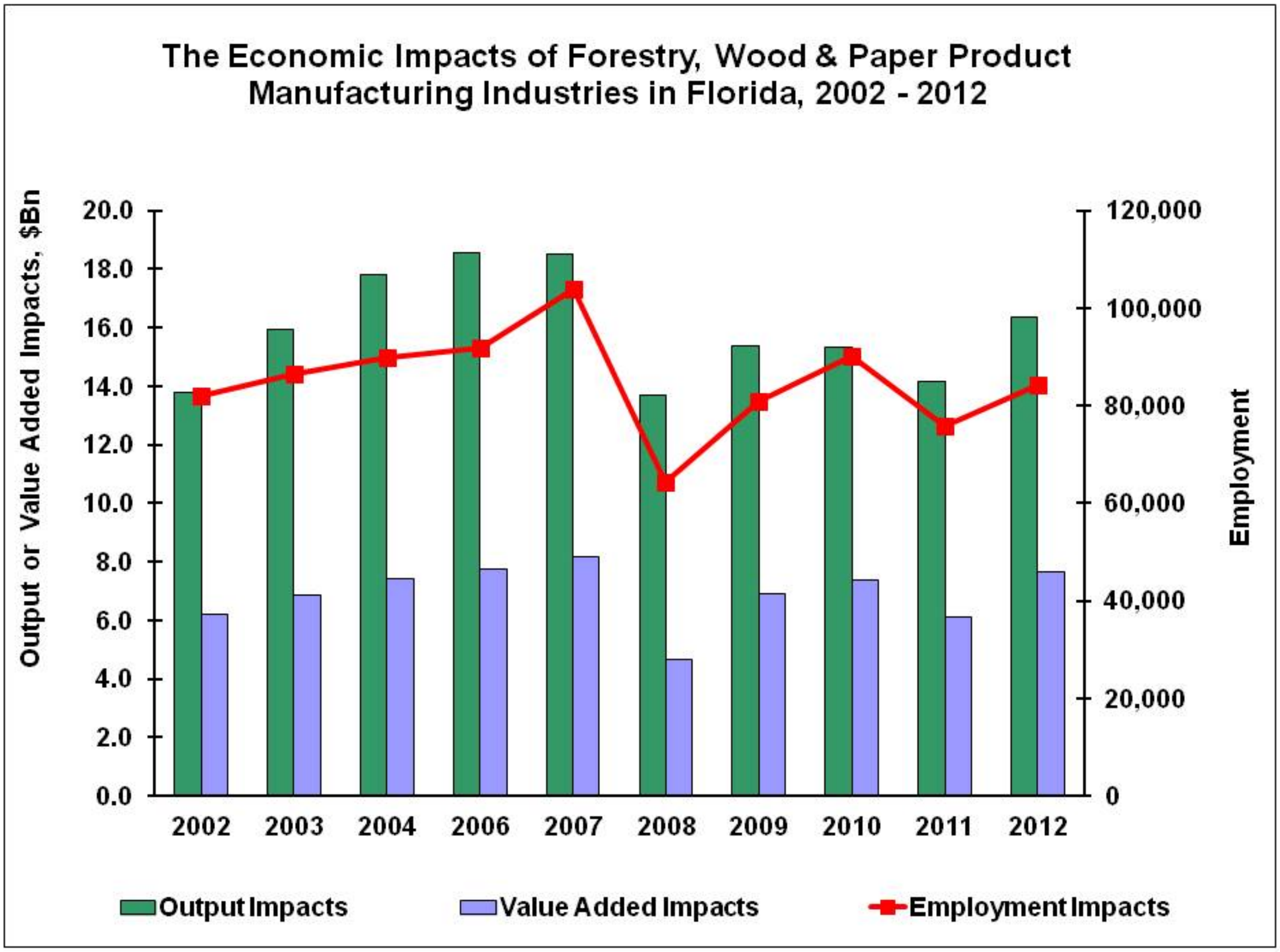

Figure 1. Economic impacts of forestry, wood and paper product manufacturing industries in Florida between 2002 and 2012.

Employment:

2012 employment impacts were **84,000 full and part-time jobs**, which was 8,000 more jobs than in 2011. The 2012 employment in forestry and forest products industry represented a 31% increase over 2008 employment at the lowest point of the recession.

Value Added:

At $7.64 billion, value added impacts were 25% higher in 2012 than in 2011 (Fig. 1), and a whopping 64% higher than in 2008 at the lowest point of the recent recession.

Compensation:

In 2012, the pulp and paper products industry supported 73% of income paid to the labor force employed in forestry and related industries. At 15%, forest management and logging was the next largest sector in terms of income paid out to workers. Secondary wood products sector generated 8% of income, while lumber, veneer and panels manufacturing paid the remaining 4% of wages and benefits in forestry-related occupations in 2012 (Fig. 2).

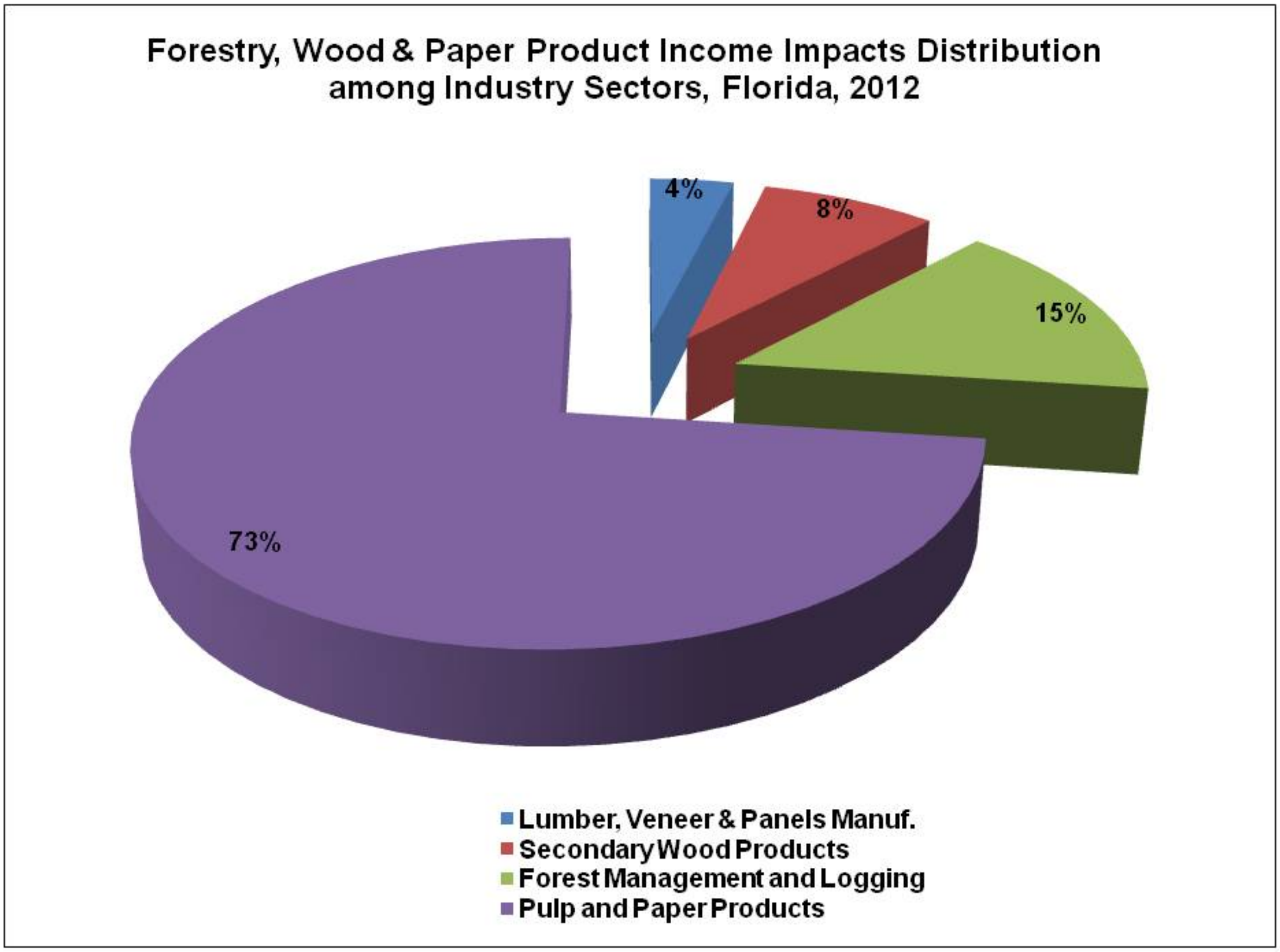

Figure 2. Labor income impacts distribution among forestry, wood and paper product industry sectors in Florida, 2012**.**

Export Value:
At $5.83 billion in 2012, and similarly to other economic indicators, the export value of Florida's forest products to out-of-state destinations increased 11% since 2011 (Fig. 3).

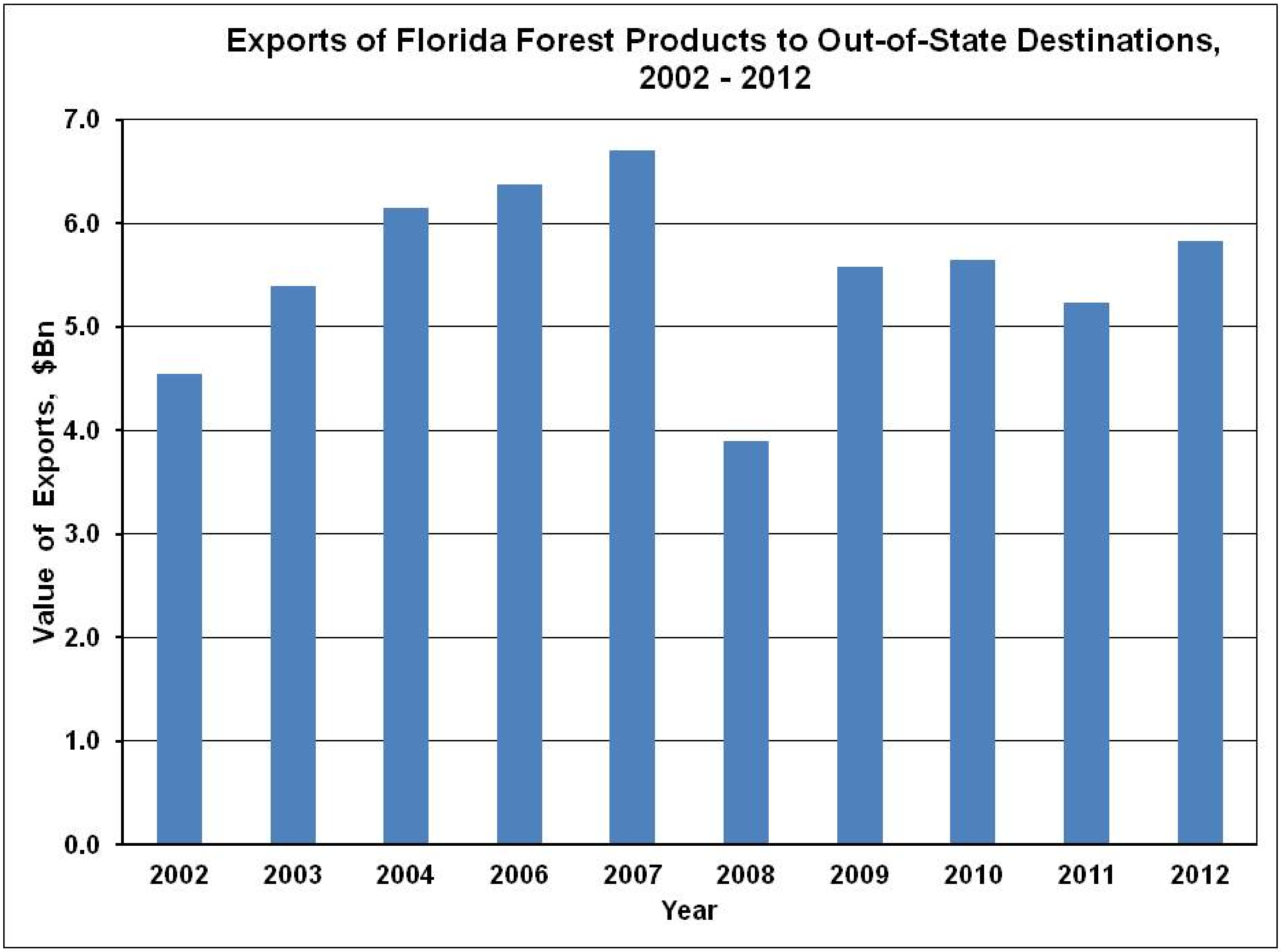

Figure 3. Export value of Florida's forest products to out-of-state destinations between 2002 and 2012.

Fiscal Impacts:
In 2012, indirect business tax impacts of forestry and forest products industries in Florida were nearly $606 million. Of that amount, $449 million was generated by pulp and paper sector, $114 million by forest tract management and logging activities, $24.5 million by secondary products manufacturing, and $18.5 million by lumber, veneer and panel manufacturing industries.

Total other property income impacts, such as interests, rents, royalties and dividends, were $2.57 billion in 20112. The largest share again was generated by pulp and paper manufacturing at $2.06 billion. Forest tract management and logging activities generated $231 million, the secondary forest products sector $205 million, while lumber, veneer and panels manufacturing generated $72 million.

Forest Ownership:
Florida timberland ownership, which supports forest products industry is 71% private (66% non-industrial, and 5% forest industry), 18% state and local, and 11% federal (Fig. 4). That translates into 11.0 million acres in private ownerships, 2.8 million acres in state and local, and 1.7 million acres in federal government ownerships.

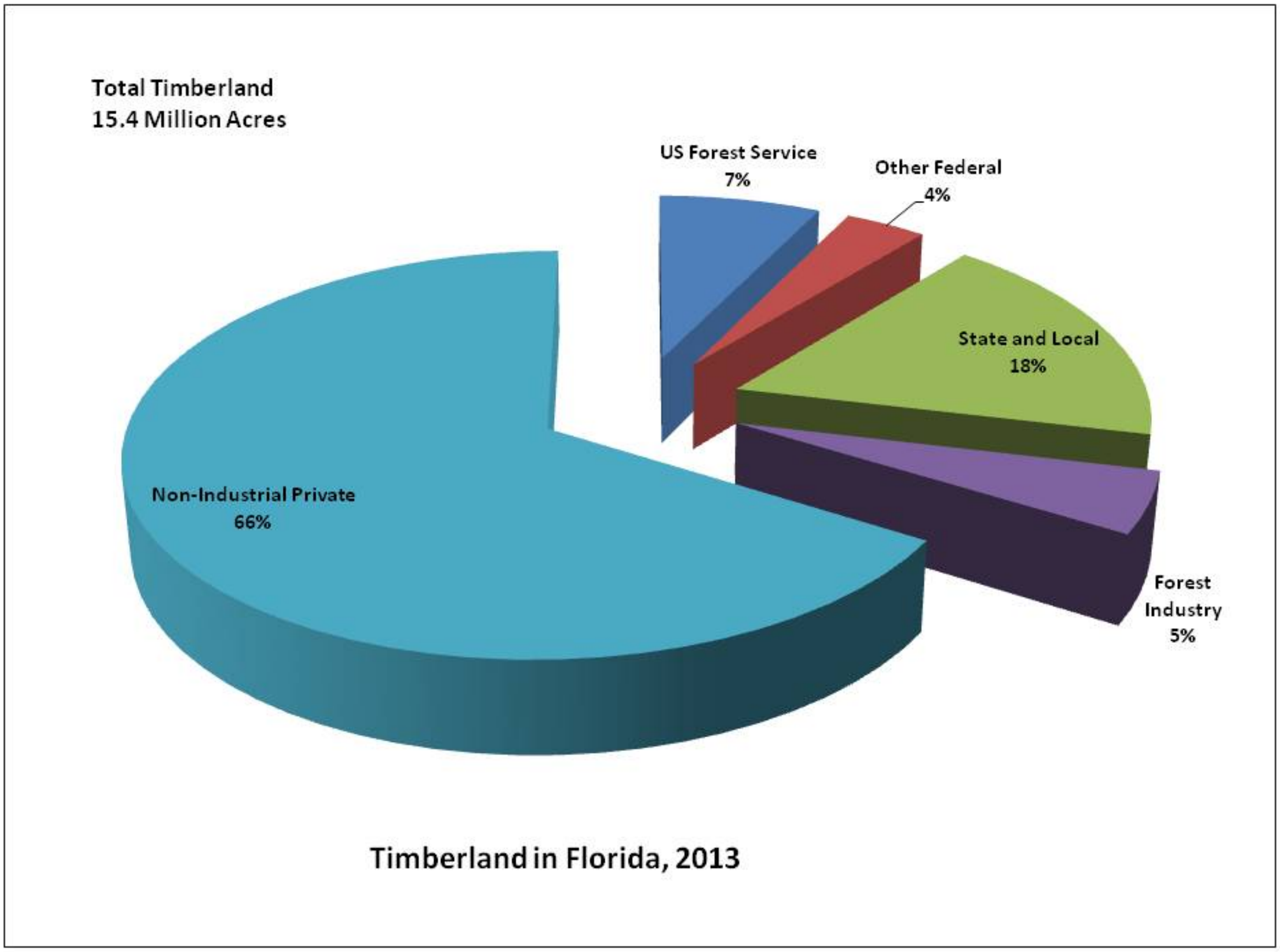

Figure 4. Florida timberland ownership by major ownership sectors, 2012.

Forest Distribution:

Although forests cover about 50% of the state's land area, Florida's forest lands are located mostly north of Orlando (Fig. 5). In the northern half of the state most counties are at least 50% forested, whereas the peninsular Florida south of Marion County is less than 50% forested. Liberty County in northwest Florida is the most forested with forest lands covering more than 90% of its area. On the other hand, four counties in the southeast tip of Florida have less than 10% of their area covered in forests (Fig. 5).

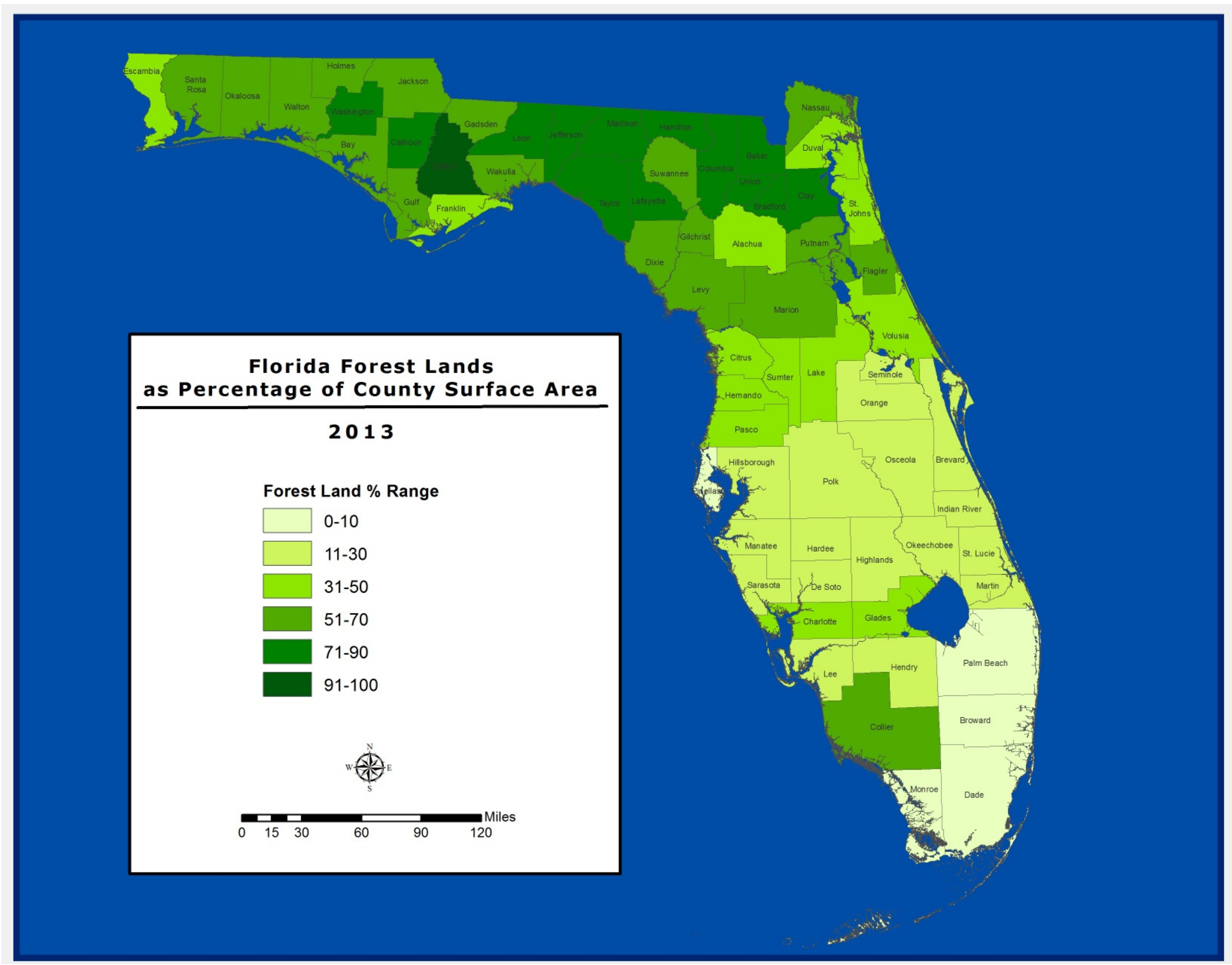

Figure 5. Florida forest lands as percentage of county surface area, 2013.

Local Importance:

In 2014, there were 73 primary wood using mills in Florida (Table 1). The local economic importance of forests depends on a number of factors including proximity to markets. The primary wood using mills in Florida are located mostly in the northern part of the state (Fig. 6) in proximity to timberland resources. Depending on type and size, which dictates raw material needs, they have the biggest economic impact in a zone of 50 to 75 mile radius. This corresponds to an area from which they can purchase wood in the most economical way, providing income to local timberland owners.

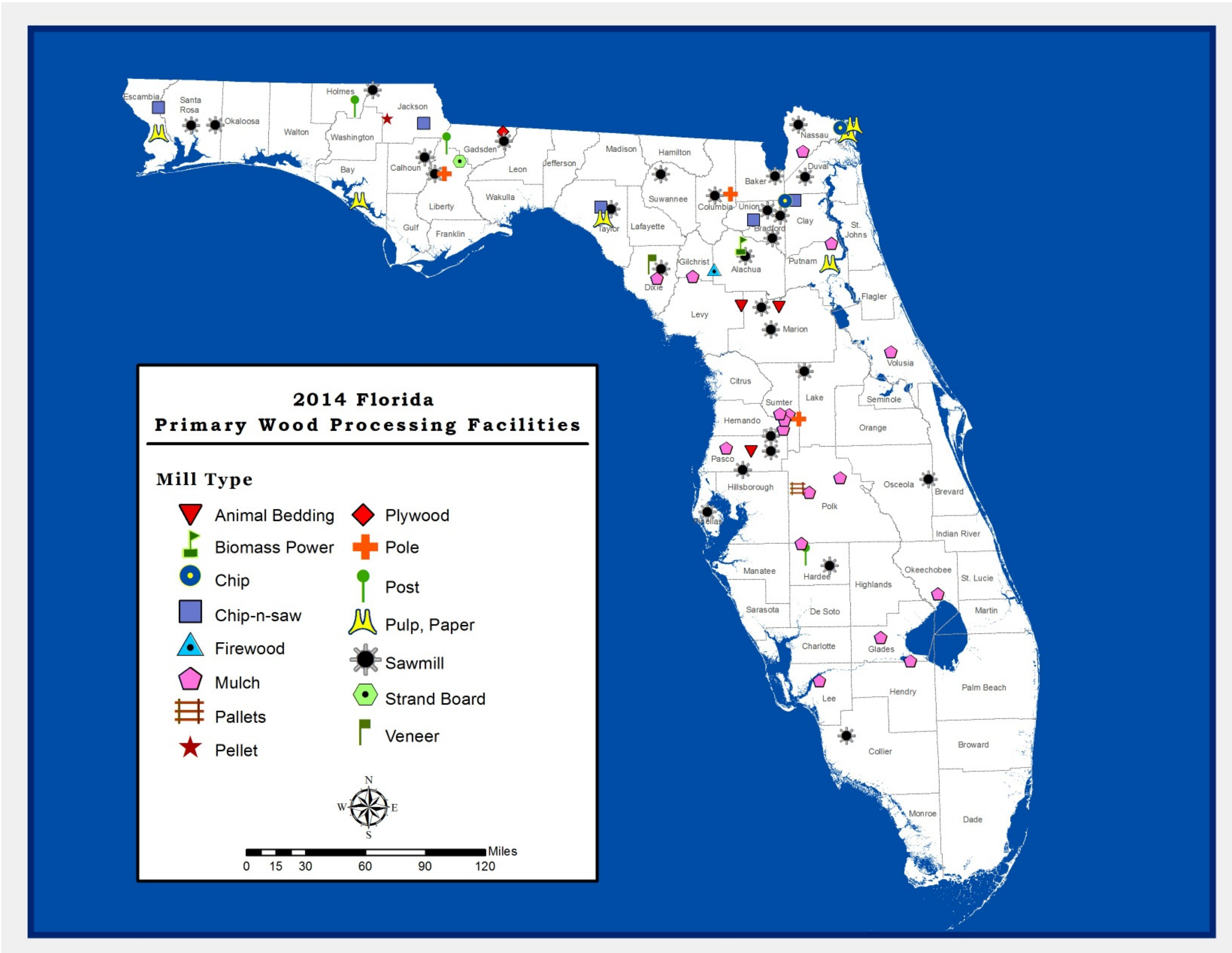

Figure 6. Florida primary wood processing facilities, 2014.

Table 1. Florida Primary Wood-using Mills, 2014

Mill Type	Number	Mill Type	Number	Mill Type	Number
Sawmill	27	Post	3	Pallet	1
Mulch	17	Animal bedding	3	Pellet	1
Pulp, Paper	6	Chip	2	Plywood	1
Chip-n-Saw	5	Biomass power	1	Strand board	1
Pole	3	Firewood	1	Veneer	1
				Total	73

Annual Wood Harvest

Between years 2009 and 2013, Florida on average harvested 472.5 million cubic feet of wood annually. Of that amount approximately 90% was harvested from private and 10% from publicly owned timberlands (Table 2). Nearly 63% of all harvested wood was either slash pine or longleaf pine. Collectively, all southern yellow pines supplied 425.6 million cubic feet, or 90% of all harvested wood annually. The remainder of wood harvest consisted of cypress (7%) and hardwood species (2%).

Table 2. Florida Average Annual Harvest Removals of Growing Stock Trees (at least 5 inches d.b.h.) on Timberland, 2009-2013

		Ownership group - Major		
	Species group	**Total**	**Public**	**Private**
			(cubic feet)	
Total		472,497,947	47,089,950	425,407,997
Softwoods:				
	Longleaf and slash pine	296,646,471	30,860,652	265,785,819
	Loblolly and shortleaf pine	87,209,006	184,756	87,024,249
	Other yellow pines	41,696,245	14,157,887	27,538,358
	Cypress	10,704,138	26,012	10,678,126
	Other eastern softwoods	127,798	13,973	113,824
Hardwoods:				
	Select white oaks	828,796	-	828,796
	Other white oaks	1,606,523	153,367	1,453,156
	Other red oaks	13,603,858	1,306,181	12,297,677
	Hickory	1,323,241	-	1,323,241
	Soft maple	2,628,327	54,912	2,573,415
	Sweetgum	3,851,660	86,156	3,765,504
	Tupelo and blackgum	7,025,855	-	7,025,855
	Ash	1,470,275	-	1,470,275
	Yellow-poplar	677,392	-	677,392
	Other soft hardwoods	3,037,585	246,053	2,791,532
	Other hard hardwoods	60,776	-	60,776

References:

IMPLAN software and Florida region data for 2012 (MIG, Inc.). Compiled by Alan W. Hodges, University of Florida, March 27, 2014.

Miles, P.D. Thu Dec 18 11:38:26 CST 2014. Forest Inventory EVALIDator web-application version 1.6.0.01. St. Paul, MN: U.S. Department of Agriculture, Forest Service, Northern Research Station. [Available only on internet: http://apps.fs.fed.us/Evalidator/tmattribute.jsp]

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