



2013 FLORIDA FORESTRY ECONOMIC HIGHLIGHTS



Economic Output:

Of Florida's 17.3 million acres of forest land, 15.4 million acres of timberlands supported economic activities. These economic activities generated \$14.52 billion in total output impacts in 2013. This was 13% less than 2012 output impacts, but still 4% more than in 2008 at the lowest point in the recent economic recession (Fig. 1).

Employment:

2013 employment impacts were 74,500 full and part-time jobs, which was 9,800 fewer jobs than in 2012. The 2013 employment in forestry and forest products industry represented a 16% increase over 2008 employment at the lowest point of the recession.

Value Added:

At \$5.56 billion, value added impacts were 28% lower in 2013 than in 2012 (Fig. 1), but still 17% higher than in 2008 at the lowest point of the recent recession.

Compensation:

In 2013, the pulp and paper products industry supported 73% of

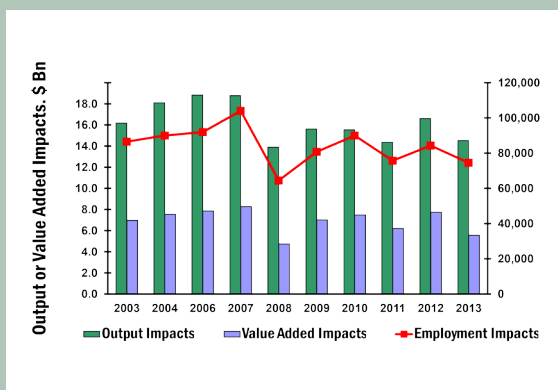
income paid to the labor force employed in forestry and related industries. At 13%, secondary wood products sector was the next largest in terms of income paid out to workers. Forest management and logging generated 10% of income, while lumber, veneer and panels manufacturing paid the remaining 4% of wages and benefits in forestry-related occupations in 2013 (Fig. 2). In dollar terms, forestry, wood and paper products industries had income impact of \$3.86 billion in 2013, which was almost 15% less than in 2012, but still nearly 22% more than in 2008 at the bottom of the recent recession.

Export Value:

At \$5.54 billion in 2013, and similarly to other economic indicators, the export value of Florida's forest products to out-of-state destinations decreased 6% since 2012 (Fig. 3). However, even this smaller value for 2013 was 40% higher than exports in 2008 at the lowest point in the recession of 2007-09.

ECONOMIC OUTPUT

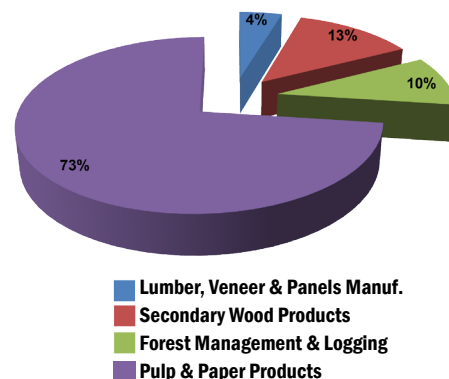
The Economic Impacts of Forestry,
Wood & Paper Product Manufacturing Industries
in Florida, 2003-2013



(Fig. 1)

COMPENSATION

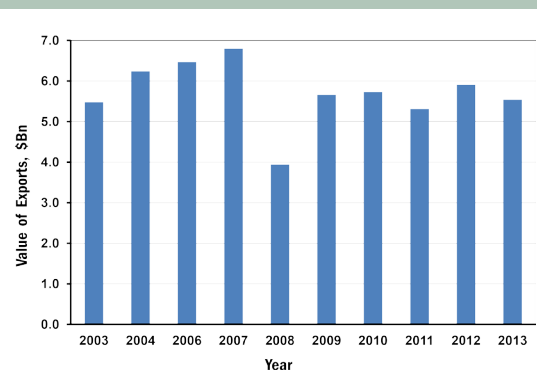
Forestry, Wood & Paper Product Income Impacts
Distribution among Industry Sectors, Florida, 2013



(Fig. 2)

EXPORT VALUE

Exports of Florida Forest Products to Out-of-State
Destinations, 2003-2013



(Fig. 3)

See next page

Fiscal Impacts:

In 2013, tax impacts on production and imports of forestry and forest products industries in Florida were \$442 million. Of that amount, \$354 million was generated by pulp and paper sector, \$34 million by forest tract management and logging activities, \$40 million by secondary products manufacturing, and \$14 million by lumber, veneer and panel manufacturing industries.

Total other property income impacts, such as interests, rents, royalties and dividends, were \$1.25 billion in 2013. The largest share again was generated by pulp and paper manufacturing at \$1.05 billion. Forest tract management and logging activities generated \$67 million, the secondary forest products sector \$78 million, while lumber, veneer and panels manufacturing generated \$57 million.

Forest Ownership:

In 2013, Florida timberland ownership, which supports forest products industry was 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.

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).

References:
Summary of Economic Contributions of Forestry and Forest Product Manufacturing Industries in Florida, 2013. Source: Implan Group LLC, Florida RPC model, all social accounts included. Compiled by Alan W. Hodges, University of Florida, February 11, 2015.

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/tmtribute.jsp>]

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.

Table 1. Florida Roundwood-Using Mills, 2014

Mill Type	Number
Sawmill	27
Mulch	17
Pulp, Paper	6
Chip-n-saw	5
Pole	3
Post	3
Animal Bedding	3
Chip	2
Biomass Power	1
Firewood	1
Pallet	1
Pellet	1
Plywood	1
Strand Board	1
Veneer	1
TOTAL	73

For more information, visit www.FloridaForestService.com or contact Jarek Nowak, Forest Utilization Specialist at (850) 681-5883 or Jarek.Nowak@FreshFromFlorida.com.

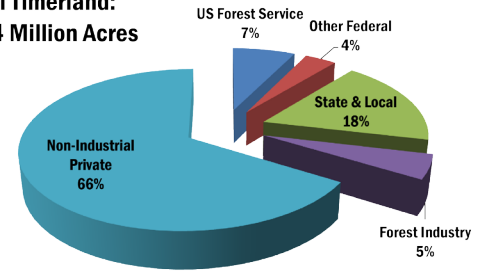
Photos courtesy of Leslie Robertson, National Association of State Foresters and Mike Branch.

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FOREST OWNERSHIP

Timberland in Florida, 2013

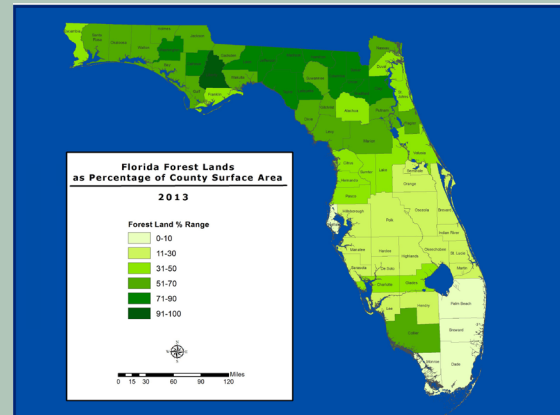
Total Timberland:
15.4 Million Acres



(Fig. 4)

FOREST DISTRIBUTION

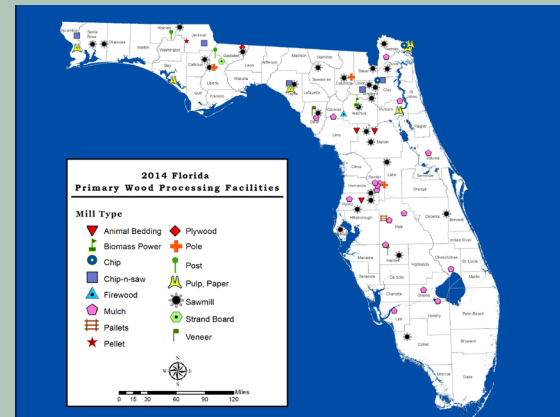
Florida Forest Lands as Percentage of County Surface Area, 2013



(Fig. 5)

ROUNDWOOD-USING MILLS

Florida Primary Wood Processing Facilities, 2014



(Fig. 6)



Florida Department of Agriculture and Consumer Services

Adam H. Putnam, Commissioner