



# 2014 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 which generated \$16.09 billion in total output impacts in 2014. This was 3% less than 2013 output impacts, but still 13% more than in 2008 at the lowest point in the recent economic recession (Fig. 1).

## Employment:

2014 employment impacts were 77,621 full and part-time jobs, which was 3,044 fewer jobs than in 2013. The 2014 employment in forestry and forest products industry represented a 20% increase over 2008 employment at the lowest point of the Great Recession.

## Value Added:

At \$6.59 billion, value added impacts were 8% lower in 2014 than in 2013 (Fig. 1), but still 36% higher than in 2008 at the lowest point of the recent recession.

## Compensation:

In 2014, the pulp and paper products industry supported 72% of income paid to the labor force employed in forestry and related industries. At 14%, secondary wood products sector was the next largest in terms of income paid out to workers. Forest management and logging generated 9% of income, while lumber, veneer and panels manufacturing paid the remaining 5% of wages and benefits in forestry-related occupations in 2014 (Fig. 2). In dollar terms, forestry, wood and paper products industries had income impact of \$3.98 billion in 2014, which was almost 6% less than in 2013, but still nearly 23% more than in 2008 at the bottom of the recent recession.

## Export Value:

At \$5.98 billion in 2014, and similarly to other economic indicators, the export value of Florida's forest products to out-of-state destinations decreased 4% since 2013 (Fig. 3). However, even this smaller value for 2014 was 48% higher than exports in 2008 at the lowest point in the Great Recession of 2007-09.

## ECONOMIC OUTPUT

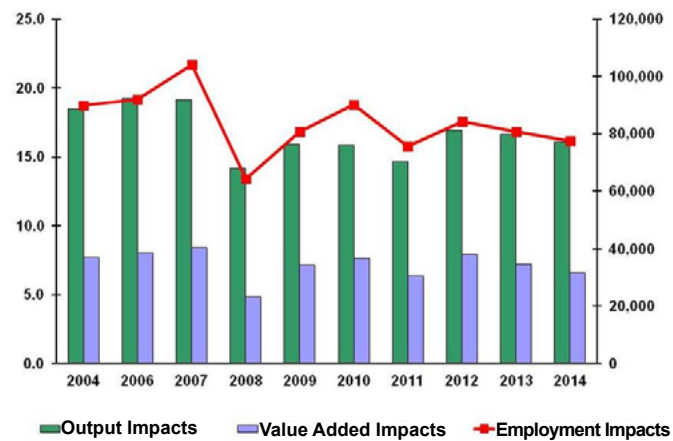


Figure 1. Economic impacts of forestry, wood and paper product manufacturing industries in Florida between 2004 and 2014.

## COMPENSATION

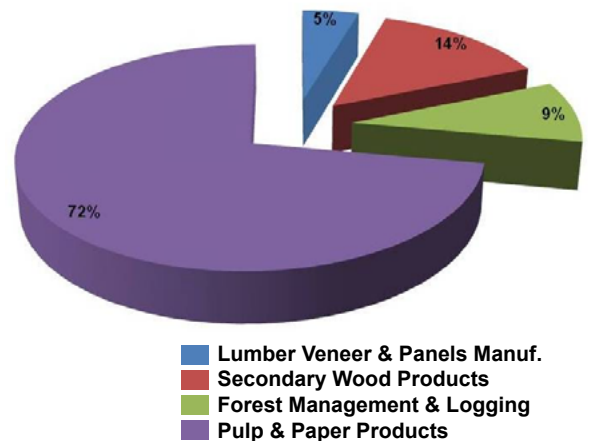


Figure 2. Labor income impacts distribution among forestry, wood and paper product industry sectors in Florida, 2014.

## EXPORT VALUE

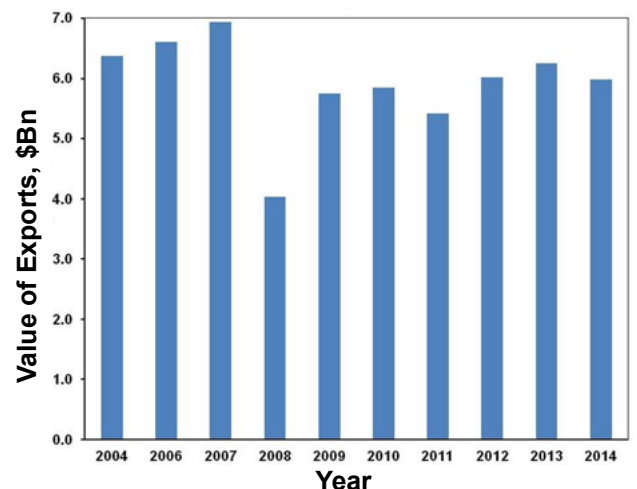


Figure 3. Export value of Florida's forest products to out-of-state destinations between 2004 and 2014.

### Fiscal Impacts:

In 2014, indirect business tax impacts of forestry and forest products industries in Florida were \$456 million. Of that amount, \$368 million was generated by pulp and paper sector, \$32 million by forest tract management and logging activities, \$43 million by secondary products manufacturing, and \$13 million by lumber, veneer and panel manufacturing industries.

Total other property income impacts, such as interests, rents, royalties and dividends, were \$2.15 billion in 2014. The largest share again was generated by pulp and paper manufacturing at \$1.658 billion. Forest tract management and logging activities generated \$171 million, the secondary forest products sector \$218 million, while lumber, veneer and panels manufacturing generated \$102 million.

### Forest Ownership:

In 2014, Florida timberland ownership, which supports forest products industry was 71% non-industrial private, 16% state, 11% federal, and 2% local government (Fig. 4). That translates into 11.0 million acres in private ownerships, 2.4 million acres in state, 1.7 million acres in federal, and 0.4 million acres in local 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).

### Local Importance:

In 2015, there were 78 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.

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

## FOREST OWNERSHIP

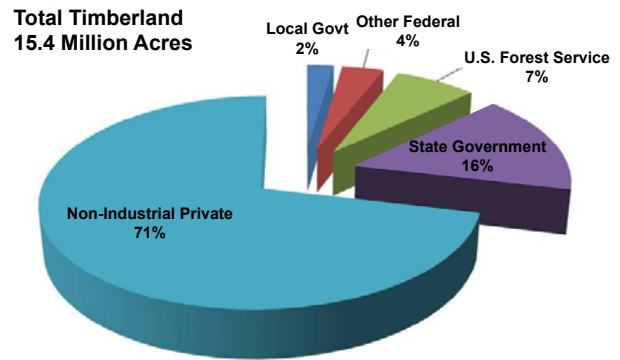


Figure 4. Florida timberland ownership by major ownership sectors, 2014.

## FOREST DISTRIBUTION

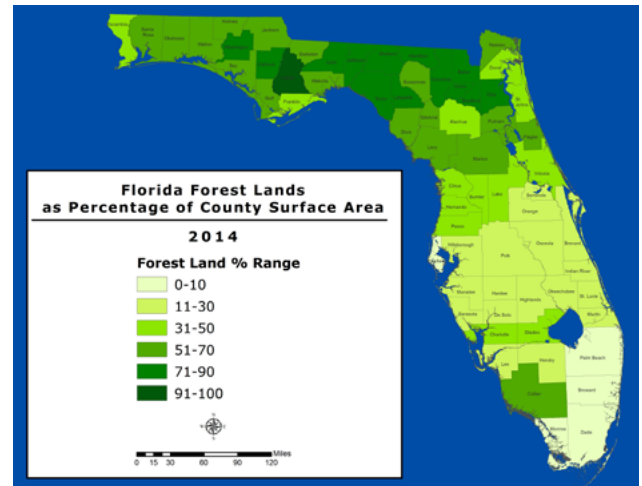


Figure 5. Florida forest lands as percentage of county surface area, 2014.

**Table 1. Florida Roundwood-Using Mills, 2015**

Mill Type	#	Mill Type	#
Sawmill	30	Firewood	2
Mulch	18	Pole	2
Pulp, Paper	6	Pallet	1
Chip-n-saw	5	Pellet	1
Chip	3	Plywood	1
Post	3	Strand Board	1
Animal Bedding	2	Veneer	1
Biomass Power	2		
<b>TOTAL</b>			<b>78</b>

Summary of Economic Contributions of Forestry and Forest Product Manufacturing Industries in Florida, 2014. Source: IMPLAN software and Florida state data. Compiled by Alan W. Hodges, University of Florida, February 12, 2016.

Miles, P.D. Fri Sep 09 15:34:12 CDT 2016. Forest Inventory EVALIDator web-application Version 1.6.0.03.

St. Paul, MN: U.S. Department of Agriculture, Forest Service, Northern Research Station. [Available only on internet: <http://apps.fs.fed.us/Evalidator/evalidator.jsp>]

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## ROUNDWOOD-USING MILLS

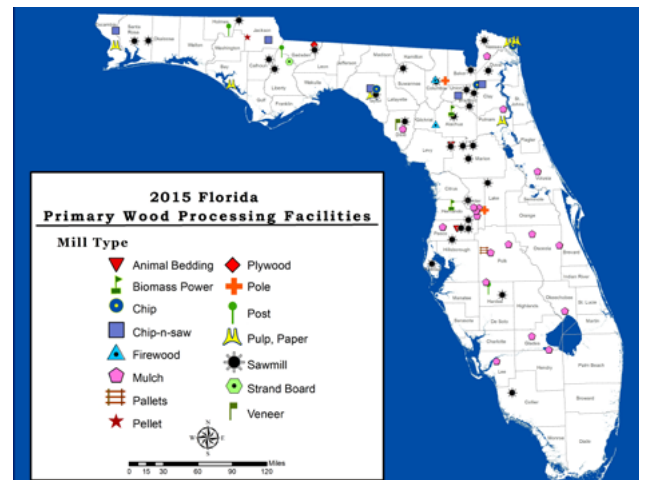


Figure 6. Florida primary wood processing facilities, 2015.

