

# FORESTRY'S IMPACT

ON SOUTH CAROLINA'S ECONOMY

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# OUTLINE

- Introduction
- Reason for study
- Activities Analyzed
- Research Approach
- Results:
  - Some details
  - Totals
  - Overall impact of S.C. Forests Products
- Summary and Conclusions



# ACTIVITIES ANALYZED

- Forest-based recreation
- Nursery and tree production (including Christmas trees)
- Forestry-related service providers
- Firewood, mulch and soil conditioners, Pine straw, and shavings mills producers
- Woody biomass energy production
- Wood-based laminates
- Mattresses production
- Blinds and shades production
- Wood casket and Wood musical instrument manufacturing
- South Carolina-based forestry product export activity
- South Carolina wood-based wholesale activity
- Forestry-related Federal Government, State Government, and University activity



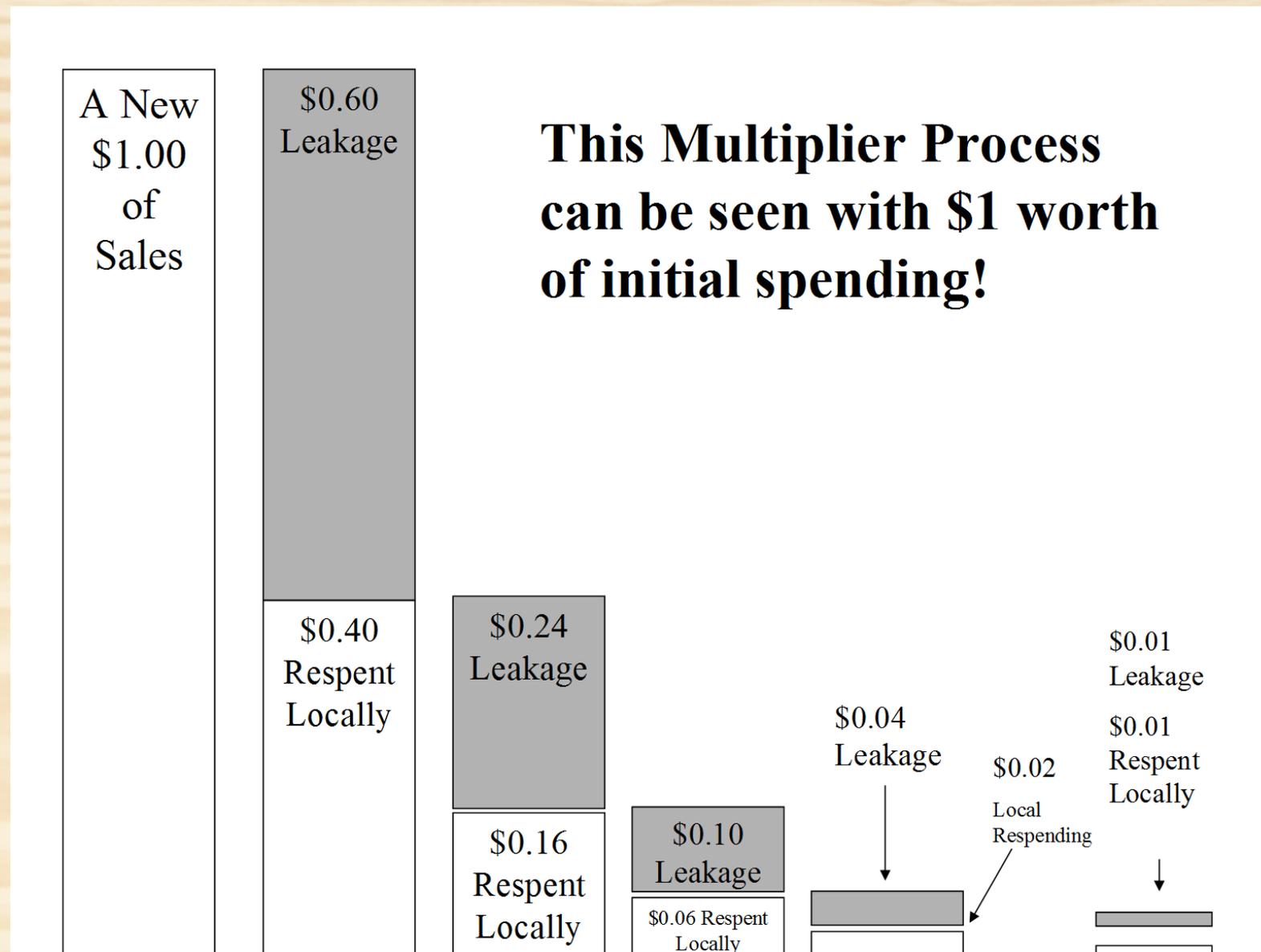
# RESEARCH APPROACH

- IMPLAN-based input-output model of S.C. Economy in 2013.
- Such models replicate the re-spending of \$s due to a certain sector (such as woody biomass-based energy) or activity (forest recreational use)
- Data for the specific activities drawn from numerous sources
  - U.S. Fish and Wildlife publication major source for forest recreation
  - S.C. Forestry Commission on-line database of primary and secondary wood processors another important source
- Total impacts: direct + indirect + induced
- Direct impacts (direct only)



# THE RESPENDING OF \$s

*i.e., The Multiplier Process*



# FORESTRY-BASED RECREATION

- Based on U.S. Fish and Wildlife Service estimates regarding outdoor recreation in South Carolina
- 10,178 jobs
- \$0.268 billion in labor income
- \$0.461 billion in Gross State Product
- \$0.778 billion in output
- Impacts throughout various parts of economy, largest in restaurants and hotels-motels.



# NURSERY & TREE PRODUCTION

## *and Forest Service Producers*

- QCEW data (U.S. Department of Labor), used in both estimate
- Christmas Trees major part of Nursery and tree production
- Direct impact:
  - 1,425 jobs
  - \$63.451 million in output
- Forest Service Providers
- Direct impact:
  - 1,341 jobs
  - \$55.755 million in output



# FIREWOOD, MULCH, PINE STRAW, SOIL CONDITIONERS...

- S.C. Forestry Commission Database and a variety of other sources.
- Direct impact:
  - 396 jobs
  - \$111.737 million in output



# WOODY BIOMASS POWER PRODUCERS

- S.C. Forestry Commission personnel/database
- Direct impact:
  - 115 jobs
  - \$111.442 million in output



# BLINDS/SHADES, WOOD LAMINATE...

- IMPLAN and QCEW data
- Direct impact:
  - 810 jobs
  - \$254.094 million in output



# FOREST-BASED PRODUCT EXPORTS, WHOLESALE...

- Wilbur Smith Associates, Inc. (2008), QCEW
- Direct impact:
  - 385 jobs
  - \$85.126 million in output



# FORESTRY-RELATED GOV'T ACTIVITY

- S.C. Forestry Commission, U.S. Forest Service, and from public records regarding Clemson University
- Direct impact:
  - 556 jobs
  - \$57.772 million in output

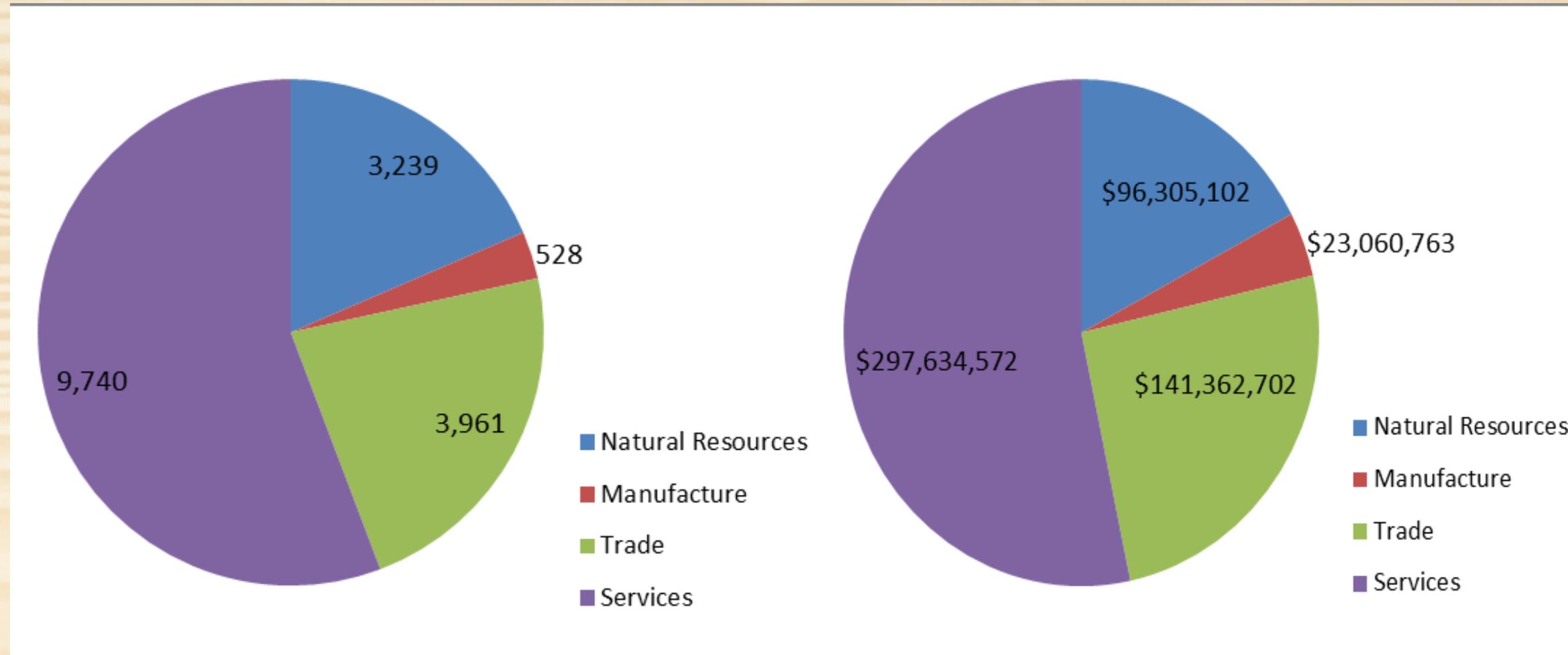


# TOTAL CONTRIBUTION OF EXAMINED ACTIVITIES

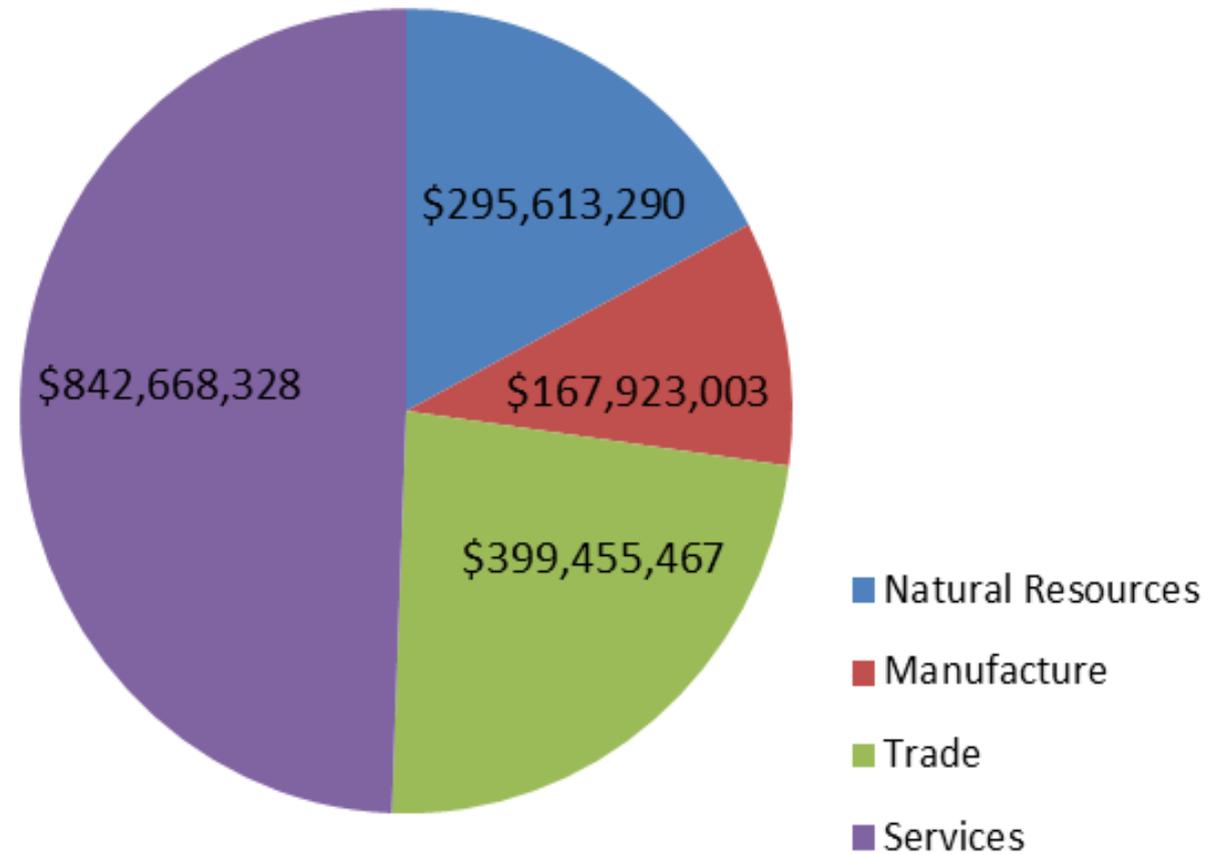
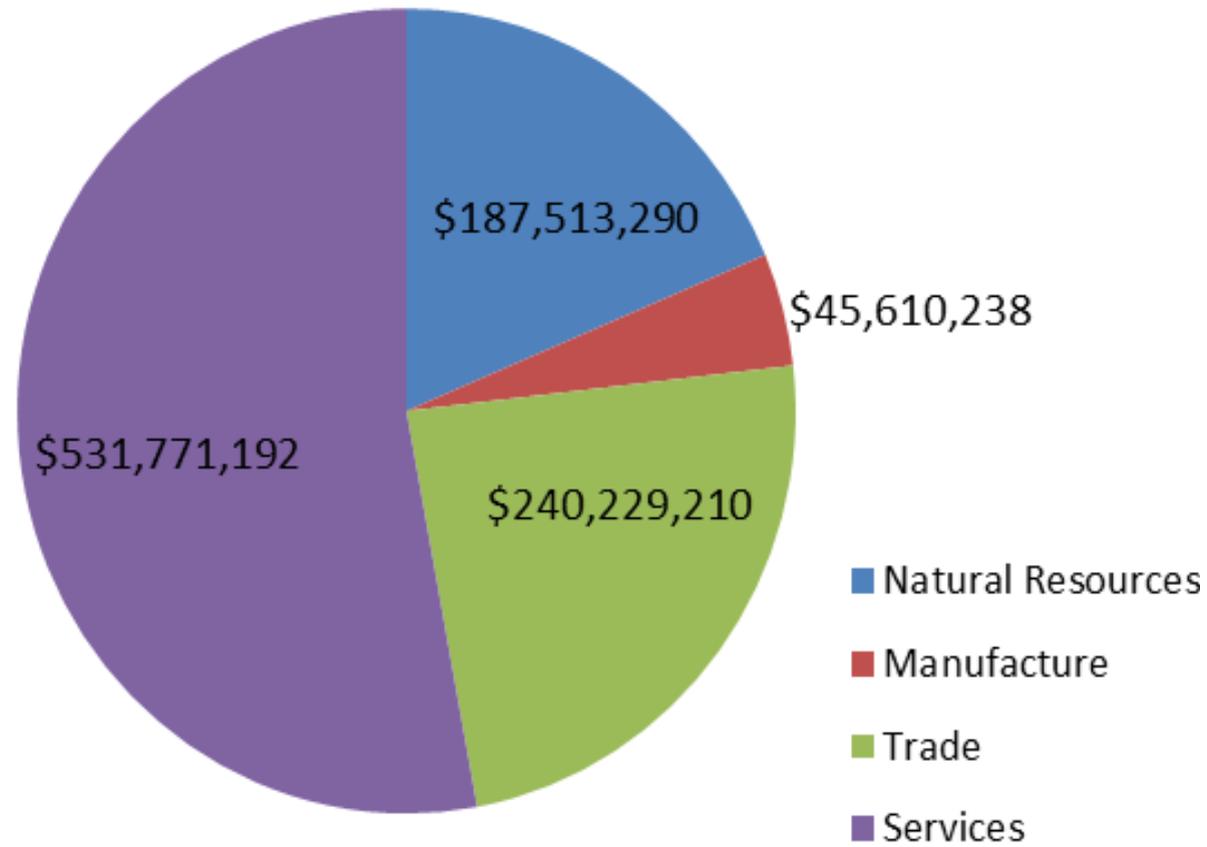
- 17,468 jobs
- \$0.558 billion in labor income
- \$1.005 billion in Gross State Product
- \$1.706 billion in output
- Divided Contribution by Major Category in S.C. Economy



# CONTRIBUTION OF JOBS & LABOR INCOME



# CONTRIBUTION OF GSP AND OUTPUT



# TOTAL CONTRIBUTION OF FORESTS/PRODUCTS

*including both studies' results*

- 90,320 jobs
- \$4.481 billion in labor income
- \$6.757 billion in Gross State Product
- \$18.573 billion in output



# SUMMARY AND CONCLUSIONS

- Economic contribution of activities evaluated in this study is significant everything from Christmas Trees to Forest-based recreation
- Adding the contribution of activities examined in this study to prior study demonstrates strong contribution by Forestry-based products to the S.C. economy!



# QUESTIONS? COMMENTS?

