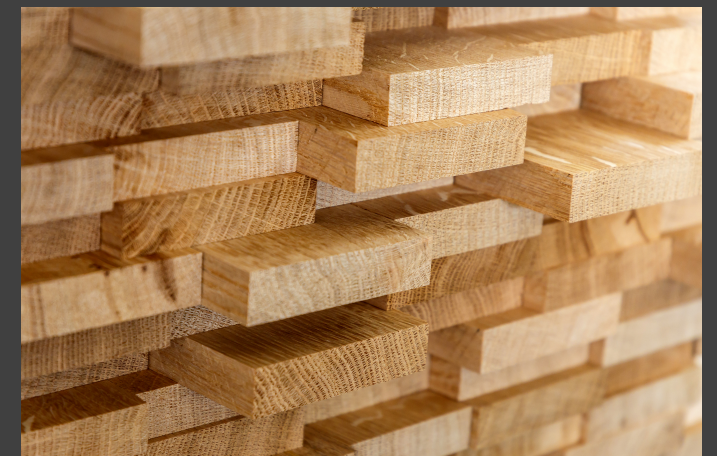


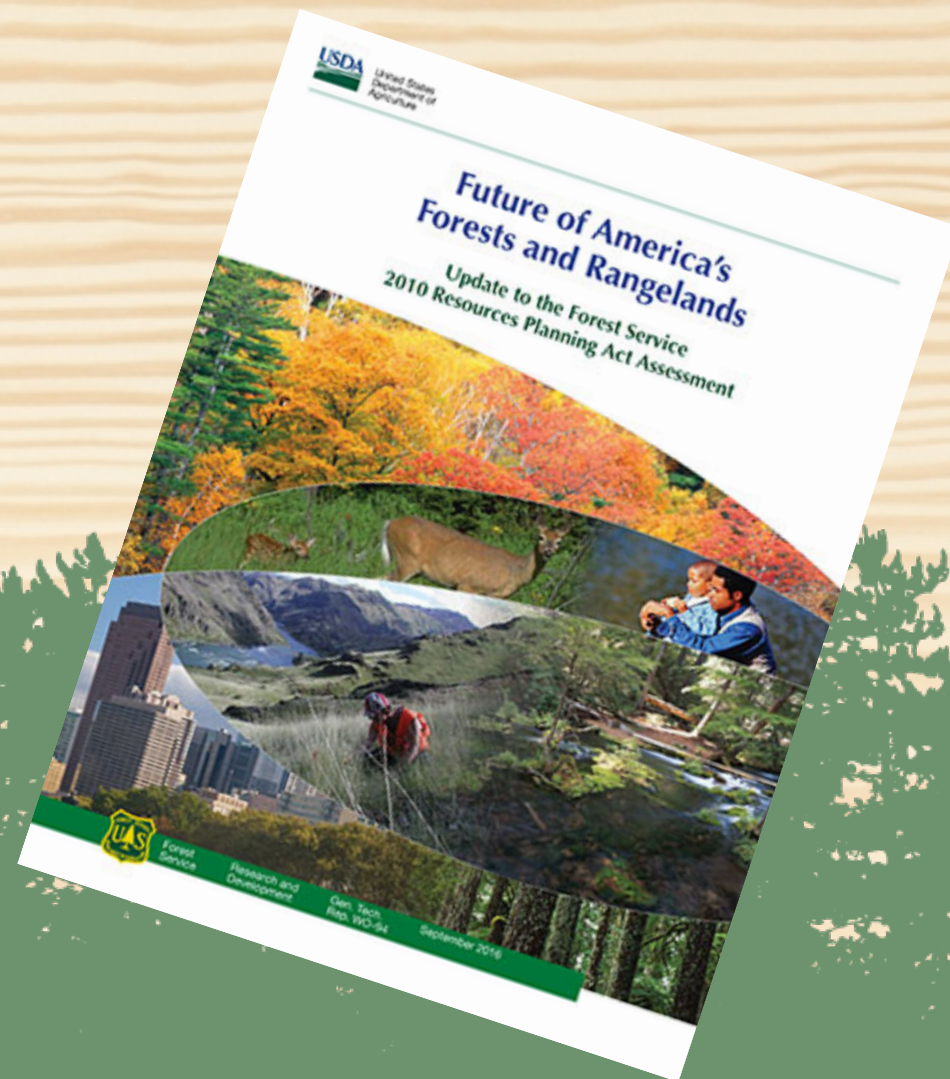
2018 DHA Spring Conference

HARDWOOD SUSTAINABILITY
South Carolina – Case Study

Tim Adams



“U.S. Forest Area Increased slightly between 2007 and 2012, continuing a trend that began in the 1980’s.”



U.S. Timberlands are Maturing

Figure 4-1. Percent of timberland by stand-size class in RPA (a) North and (b) South Regions, 1953 to 2012.

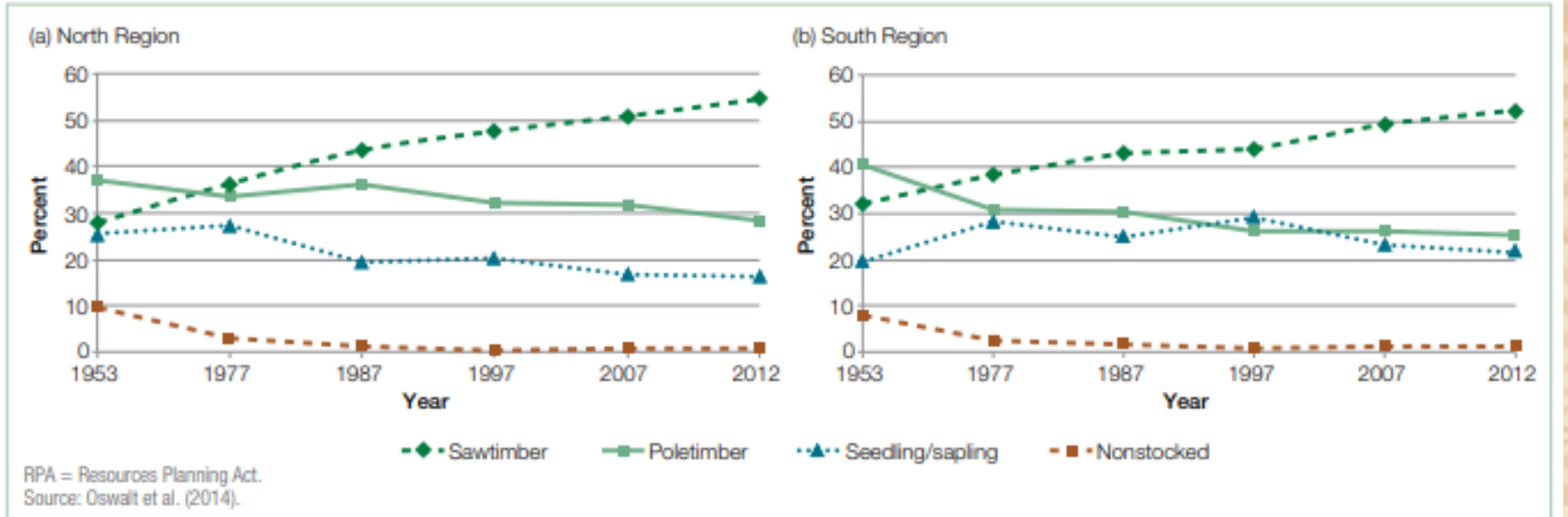
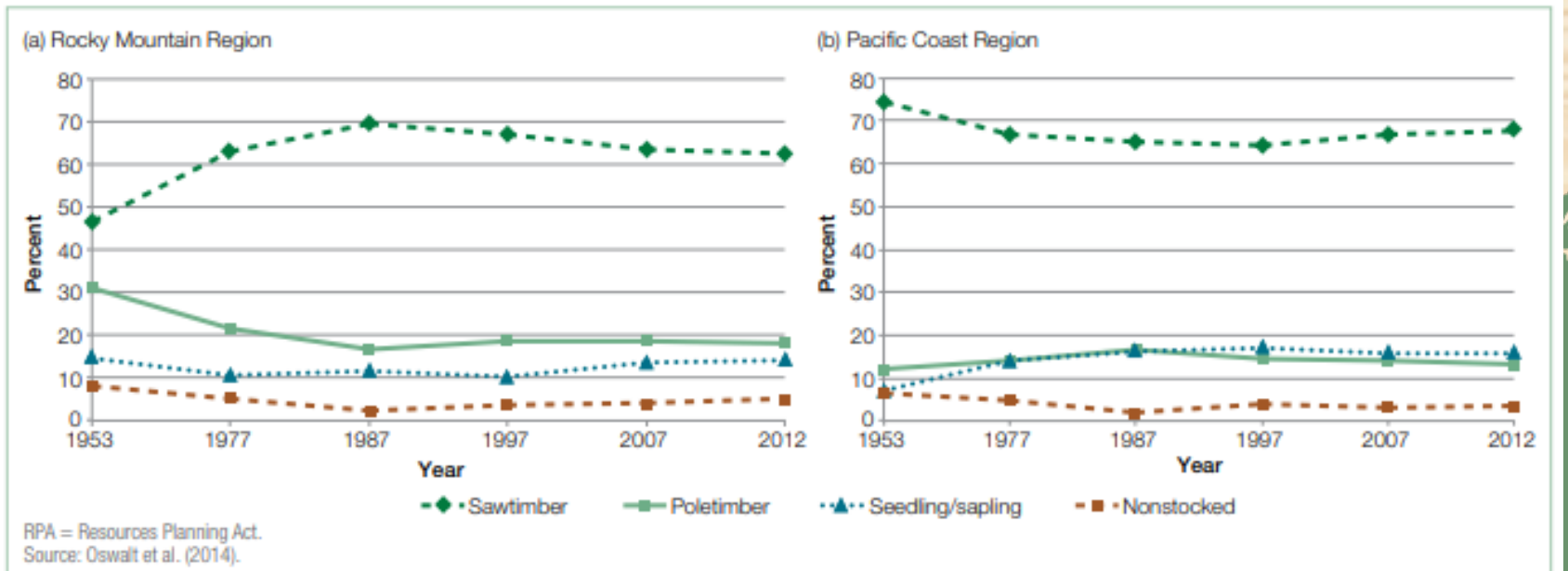


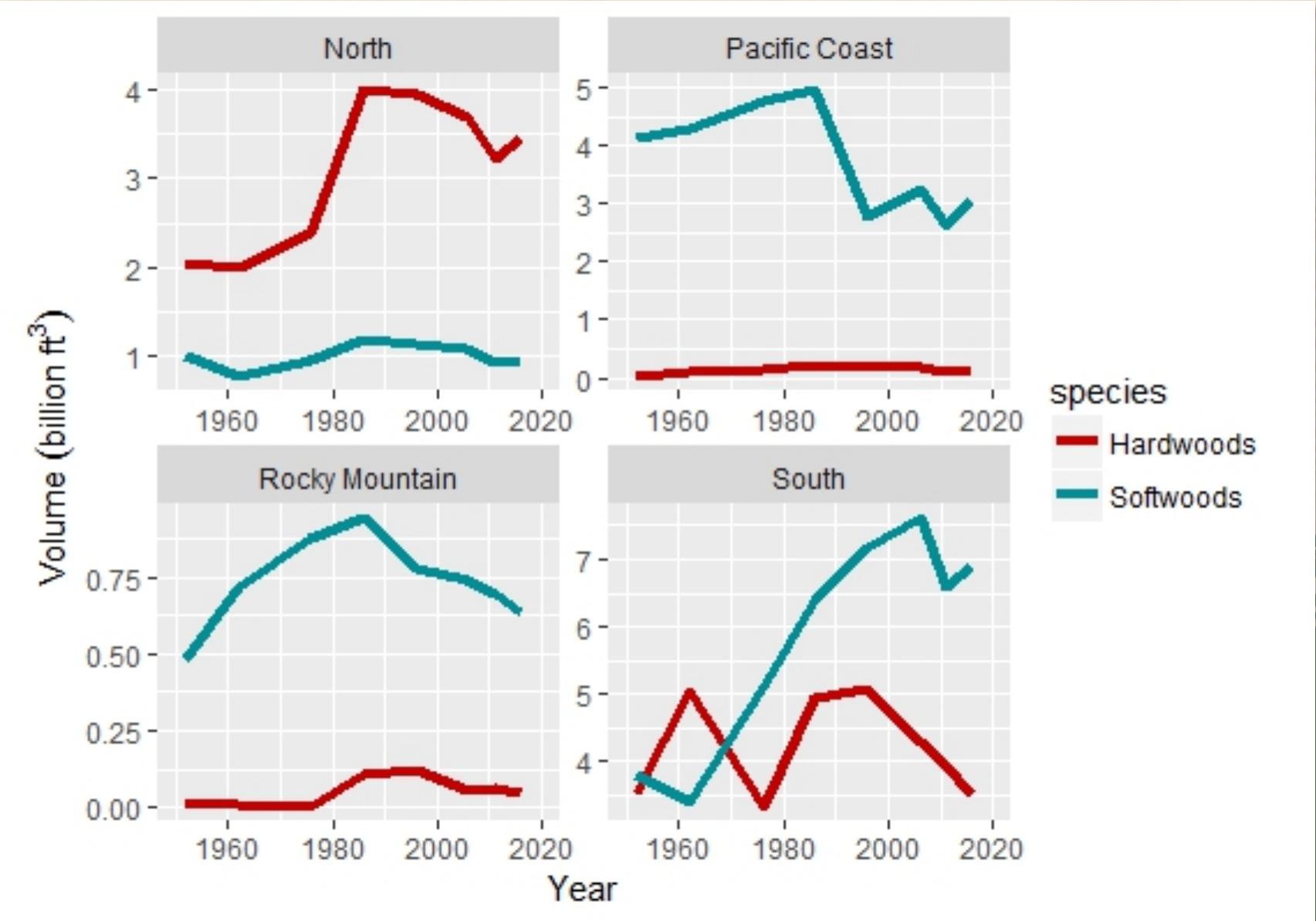
Figure 4-2. Percent of timberland by stand-size class in RPA (a) Rocky Mountain and (b) Pacific Coast Regions, 1953 to 2012.



Update to the Forest Service 2010 Resources Planning Act Assessment



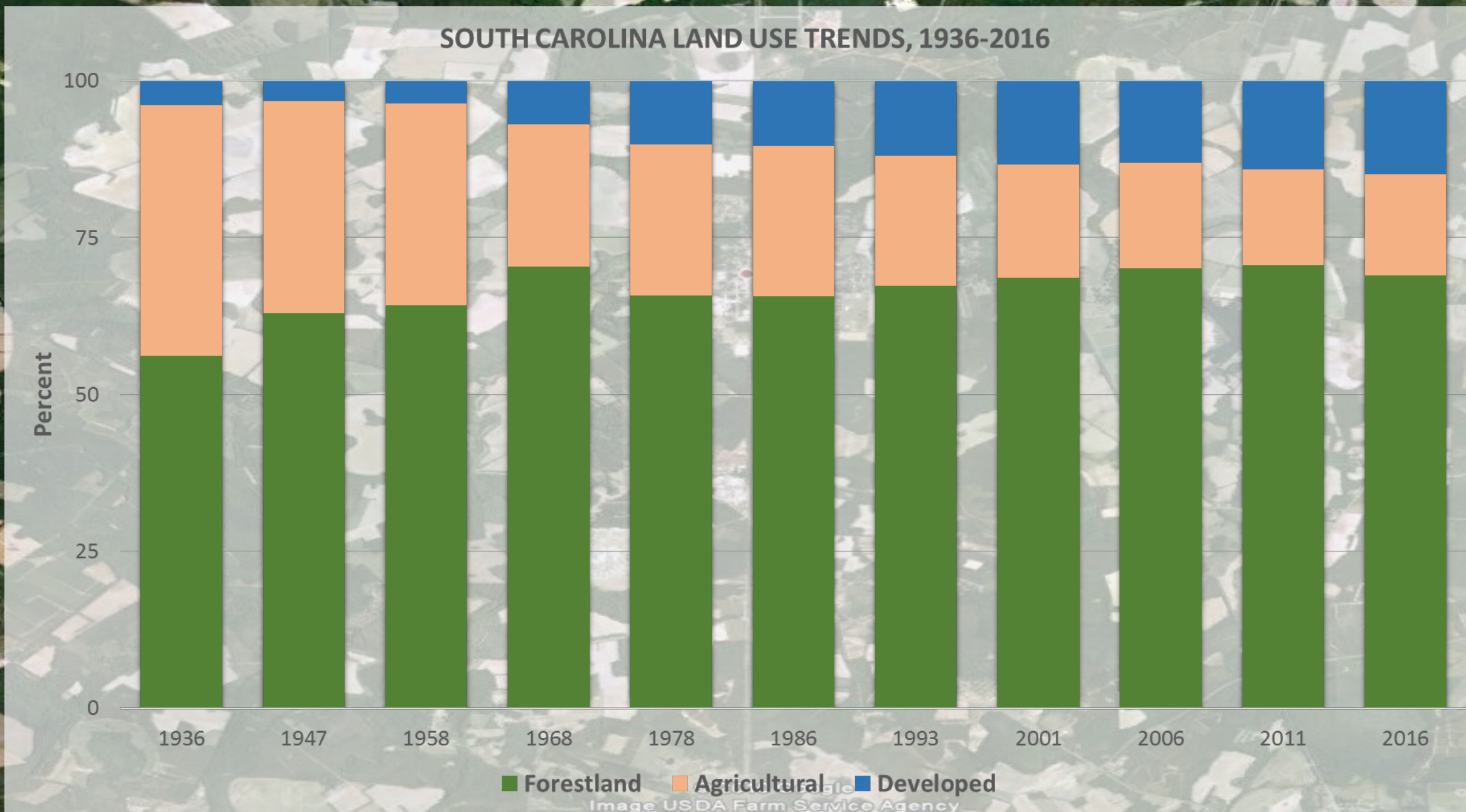
Timber Products Output (TPO) by U.S. Region



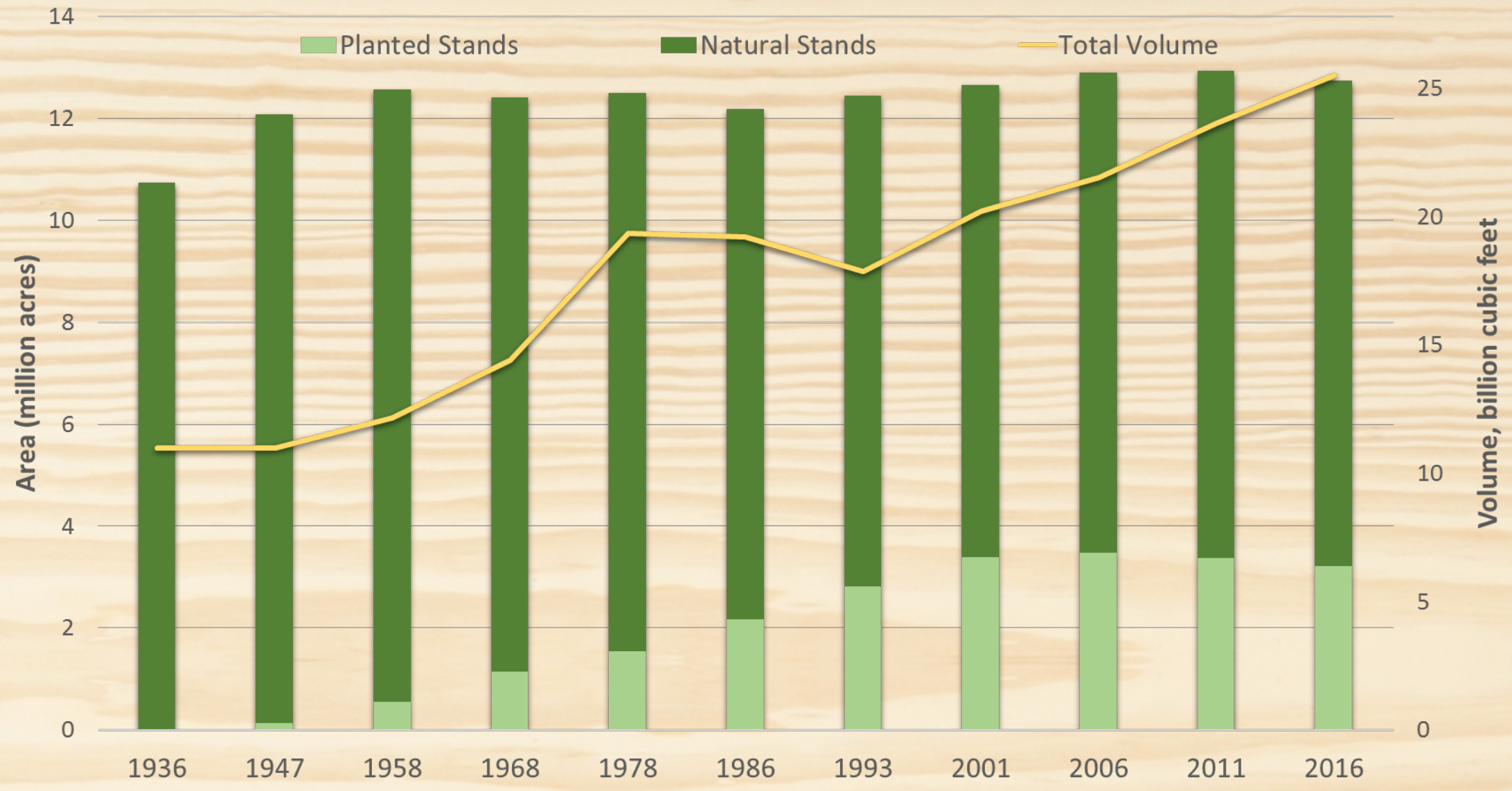
SNAPSHOT OF SOUTH CAROLINA'S FORESTS TODAY



THERE ARE 12.9 MILLION ACRES OF FORESTLAND IN SC.



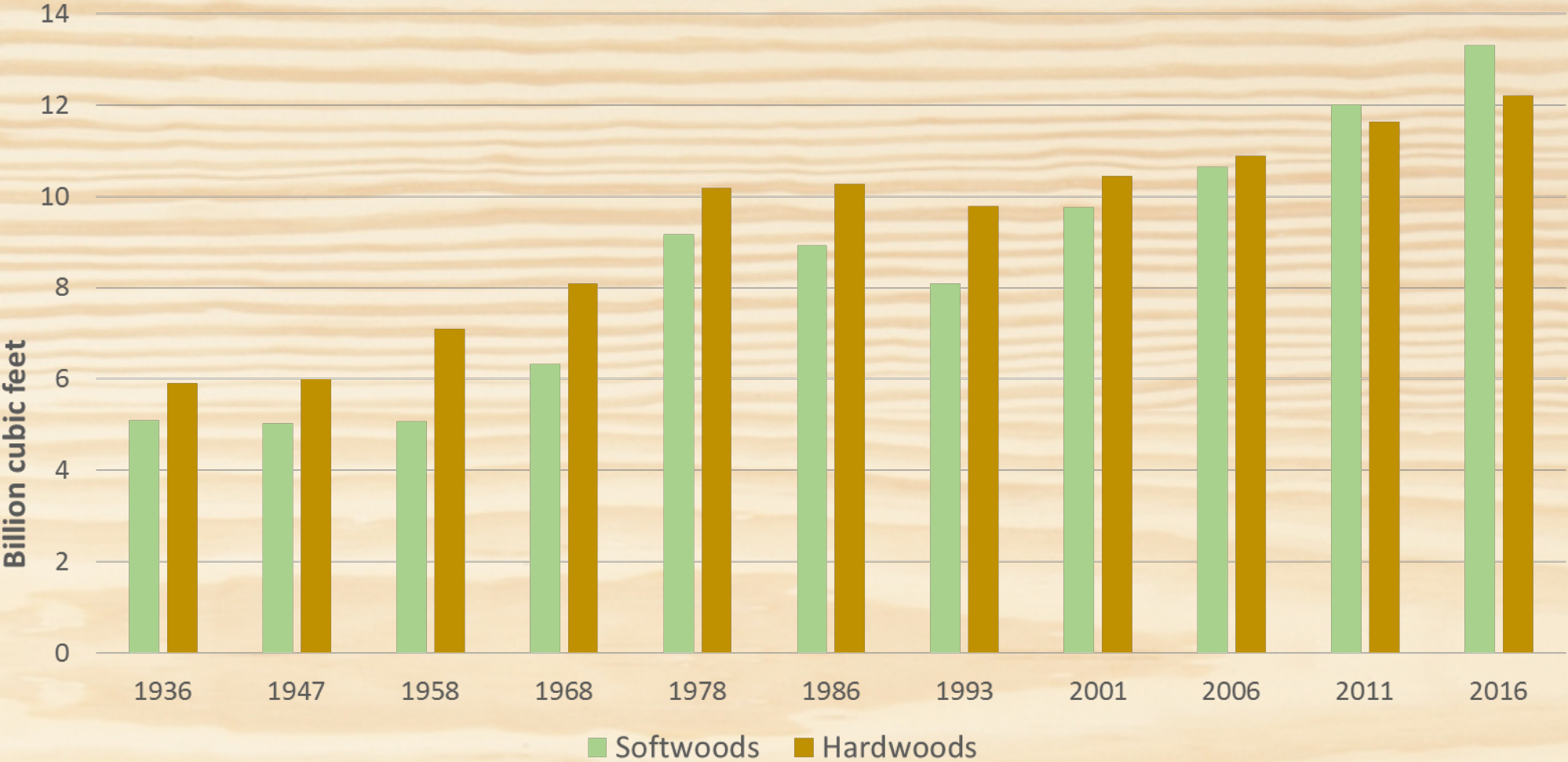
SC's FORESTS HAVE MORE WOOD THAN EVER RECORDED



SC's FORESTS HAVE MORE WOOD THAN EVER RECORDED

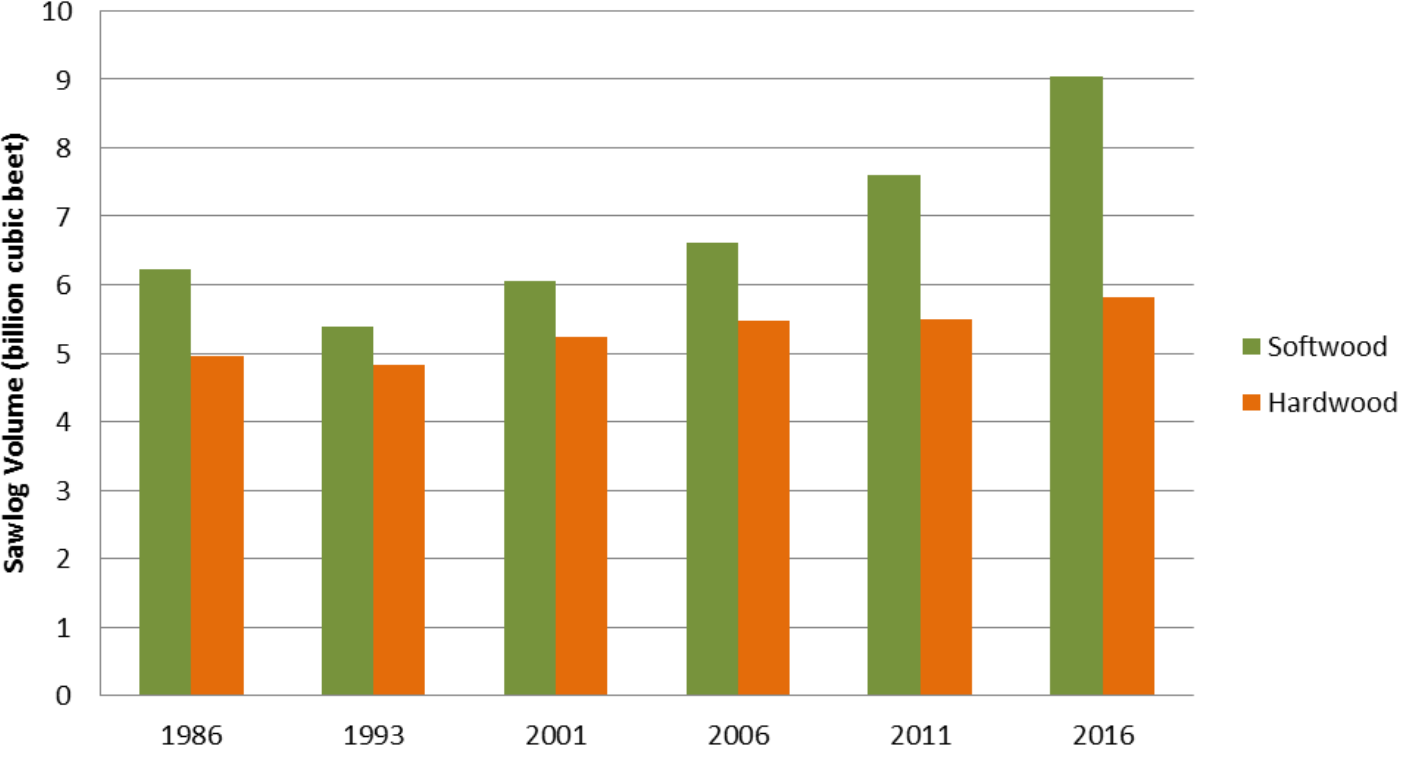
FOR BOTH SOFTWOOD & HARDWOOD

COMPARISON OF HARDWOOD/SOFTWOOD VOLUMES, 1936 -2016
Timberland, all live trees 5in+

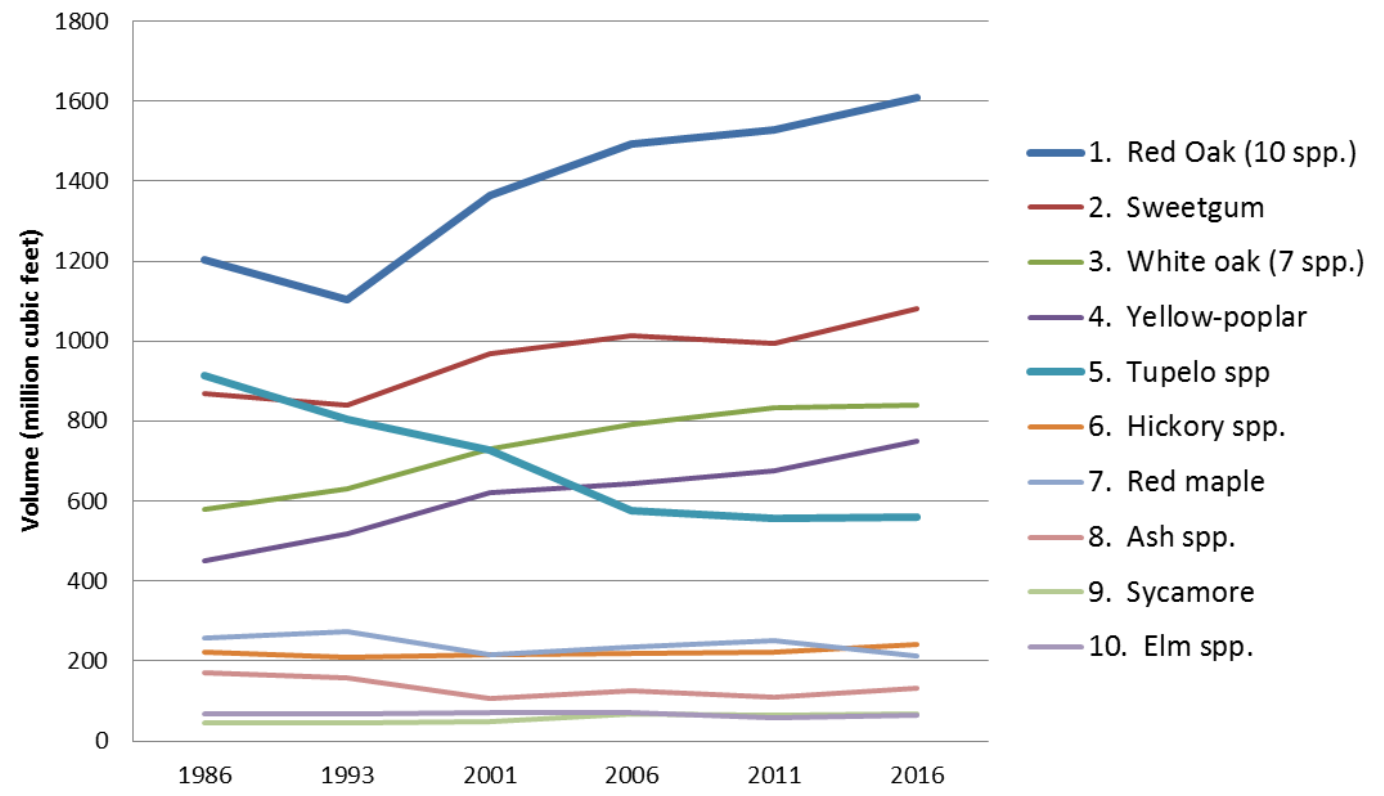


Saw-log Portion of Sawtimber Trees on the Increase

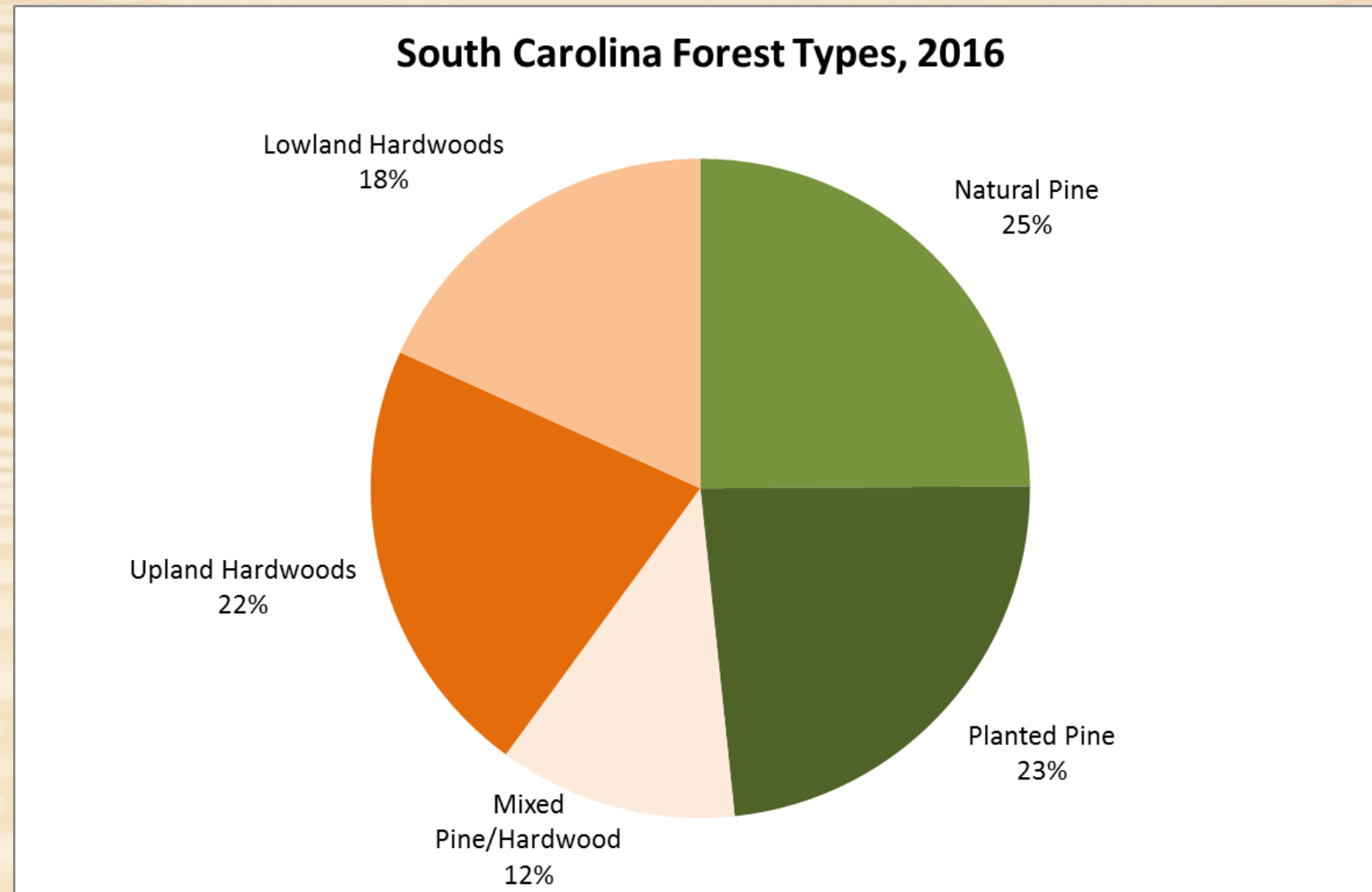
Volume of Saw-log Portion of Sawtimber Trees on Timberland



Volume of Saw-log Portion of Sawtimber Trees in South Carolina



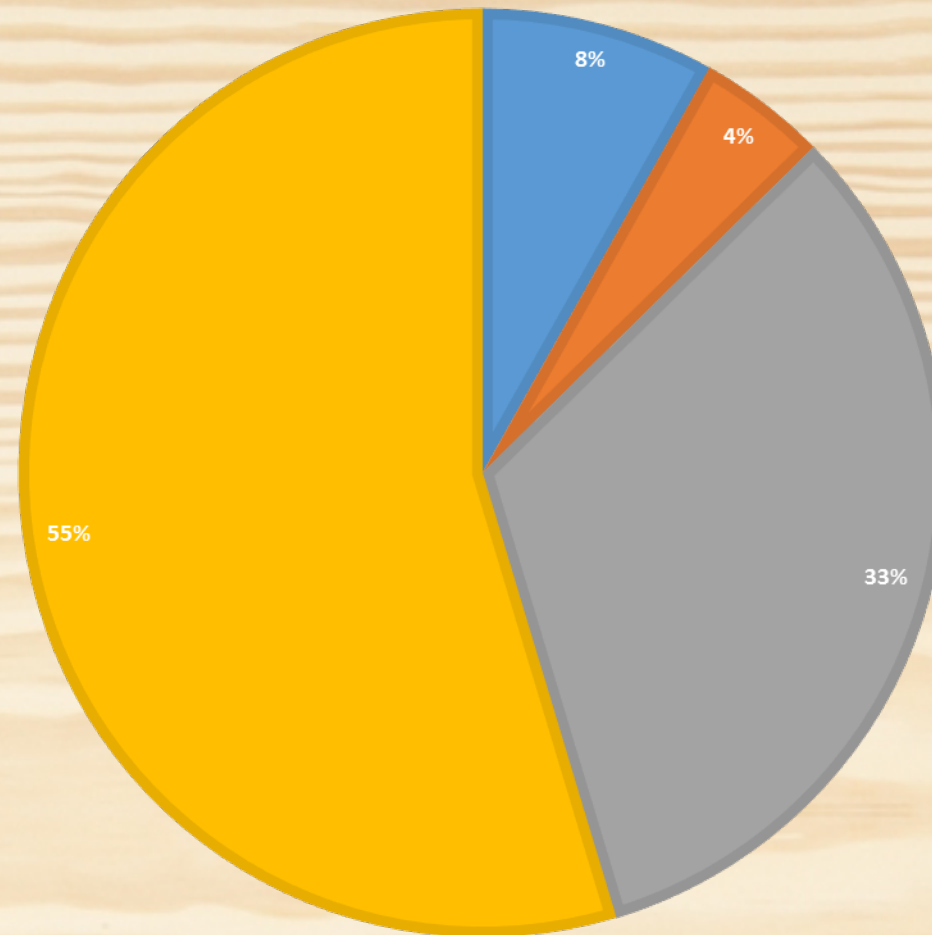
SC's FORESTS ARE BALANCED AND DIVERSE



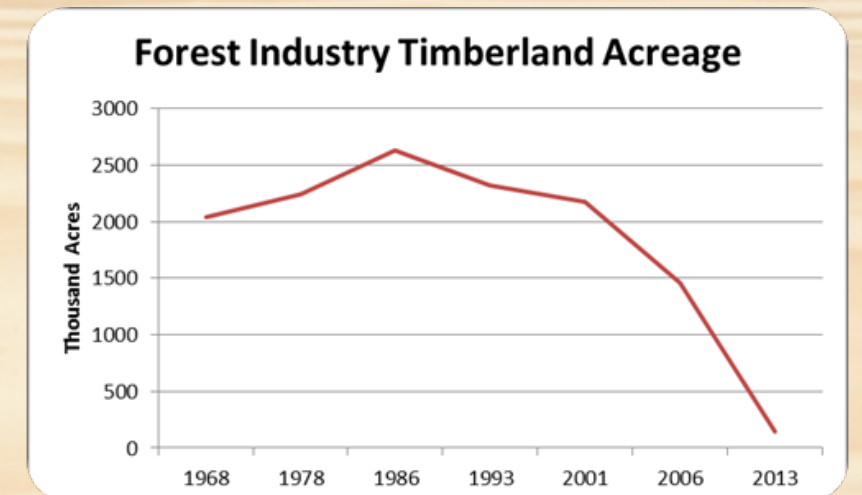
PRIVATE LANDOWNERS ARE KEY TO WOOD SUPPLY

LAND OWNERSHIP - SOUTH CAROLINA, 2016

Federal State and Local Corporate Individual

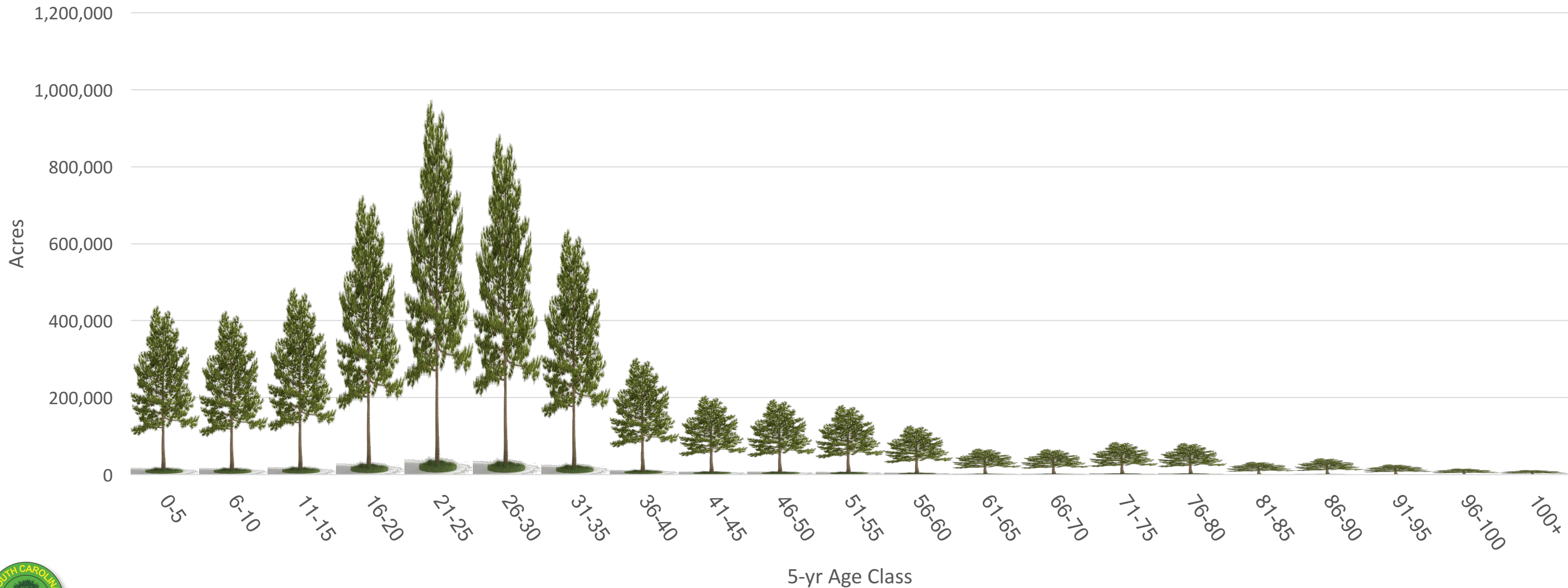


Private landowners own 88% of South Carolina's forestland and produce 96% of the state's timber supply.



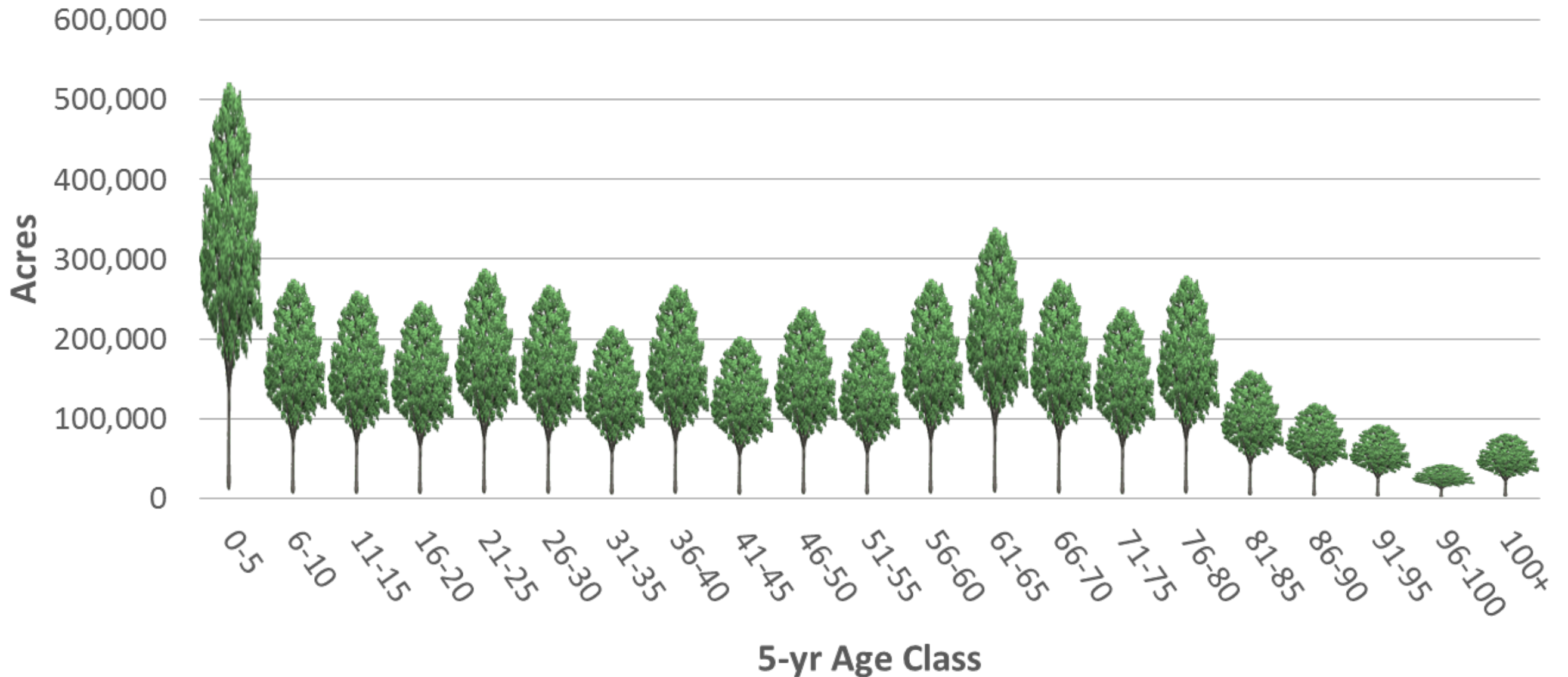
Resource Review | Wall of Wood

Timberland Acreage of Southern Yellow Pine, SC - 2016



Resource Review | Wall of Wood

TIMBERLAND ACREAGE OF ALL HARDWOOD, SC - 2016



Resource Review | Wall of Wood

TIMBERLAND ACREAGE OF OAK-GUM-CYPRESS, SC - 2016

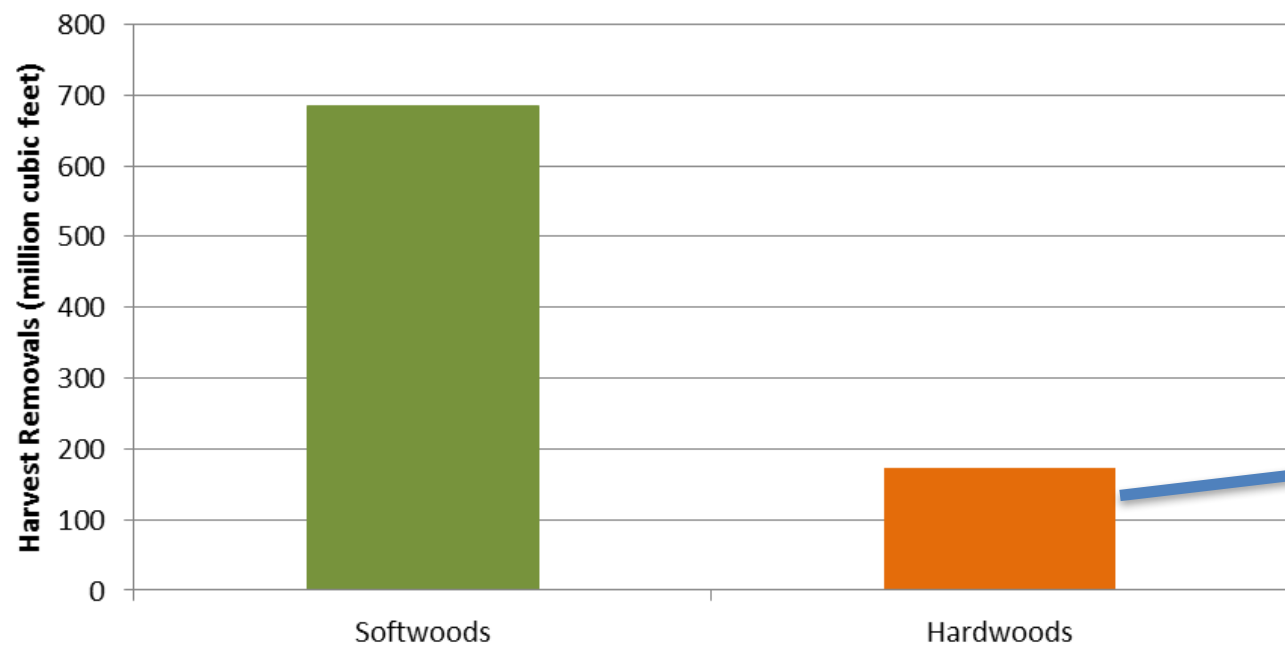


SOUTH CAROLINA'S FOREST INDUSTRY

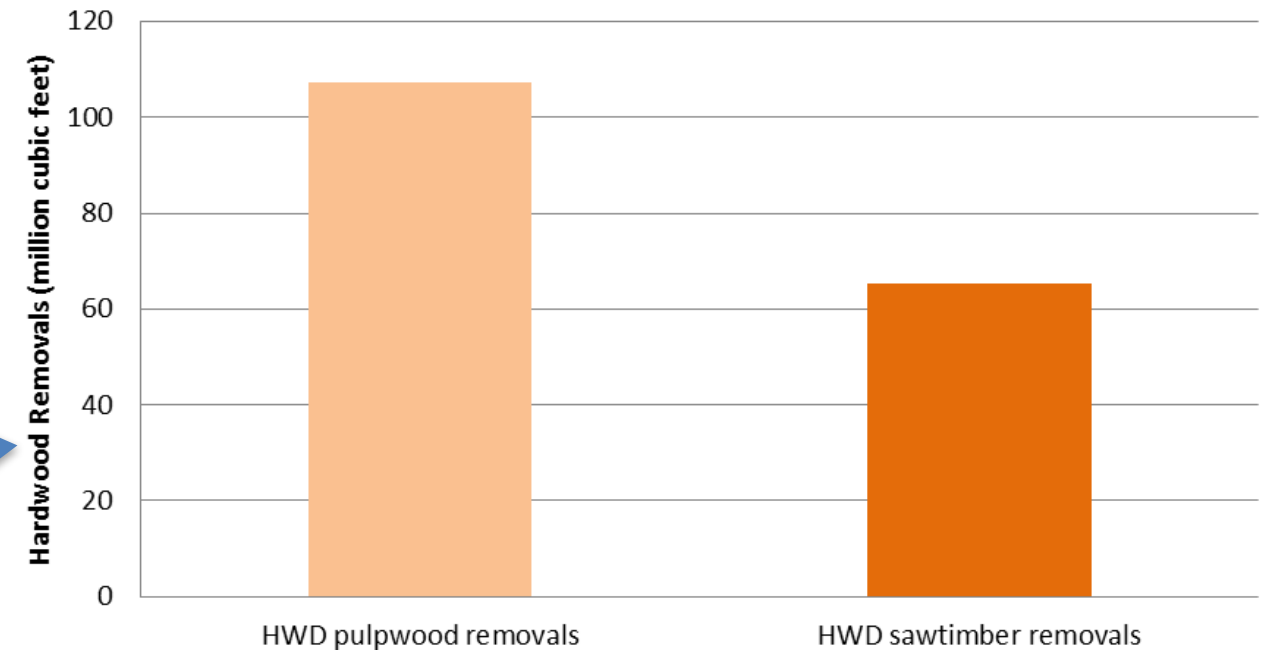


SC's HARVEST REMOVALS FOR 2016

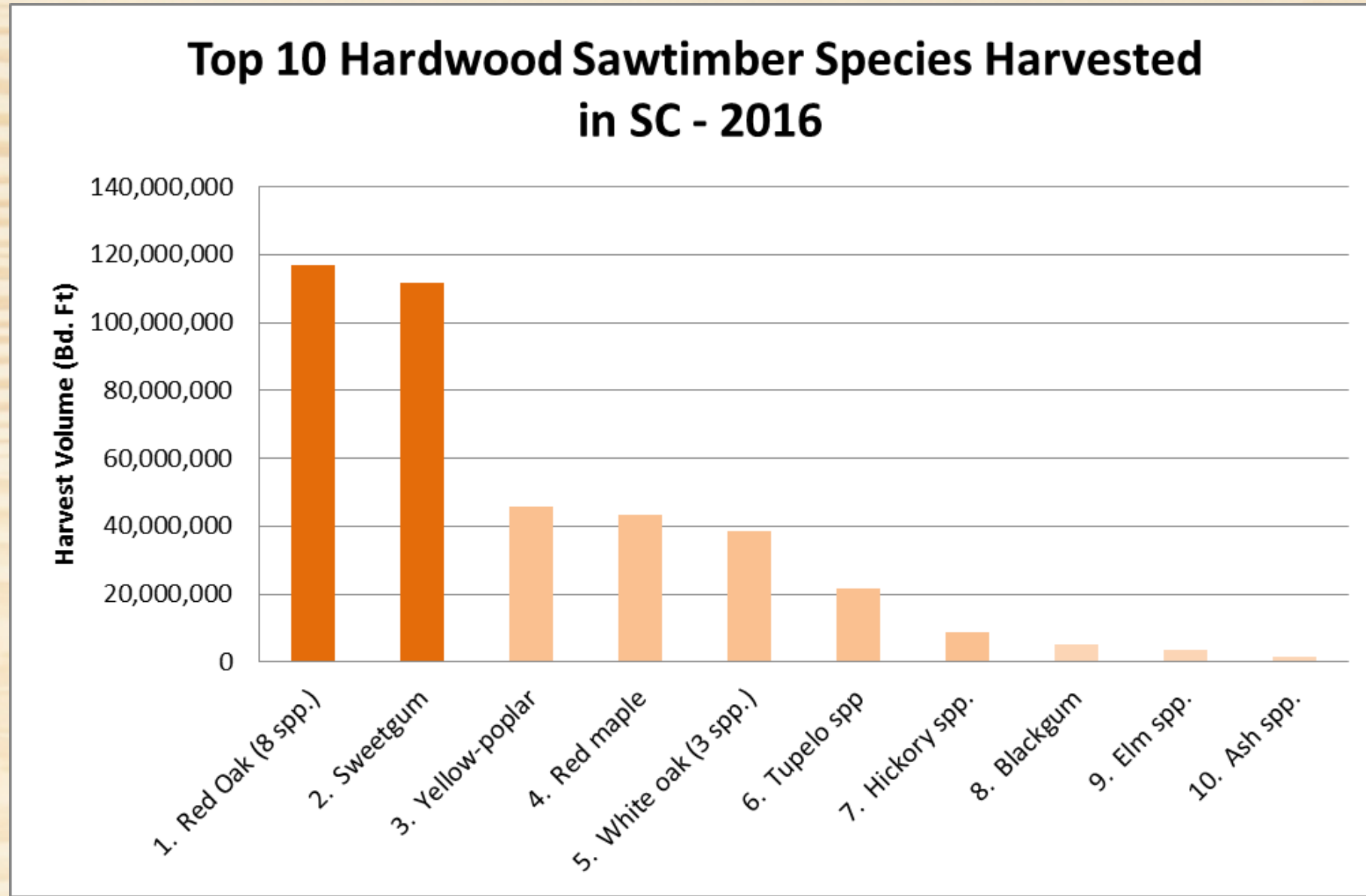
Average Annual Harvest Removals of Live Trees in SC - 2016



Hardwood Sawtimber vs Pulpwood Harvest in 2016



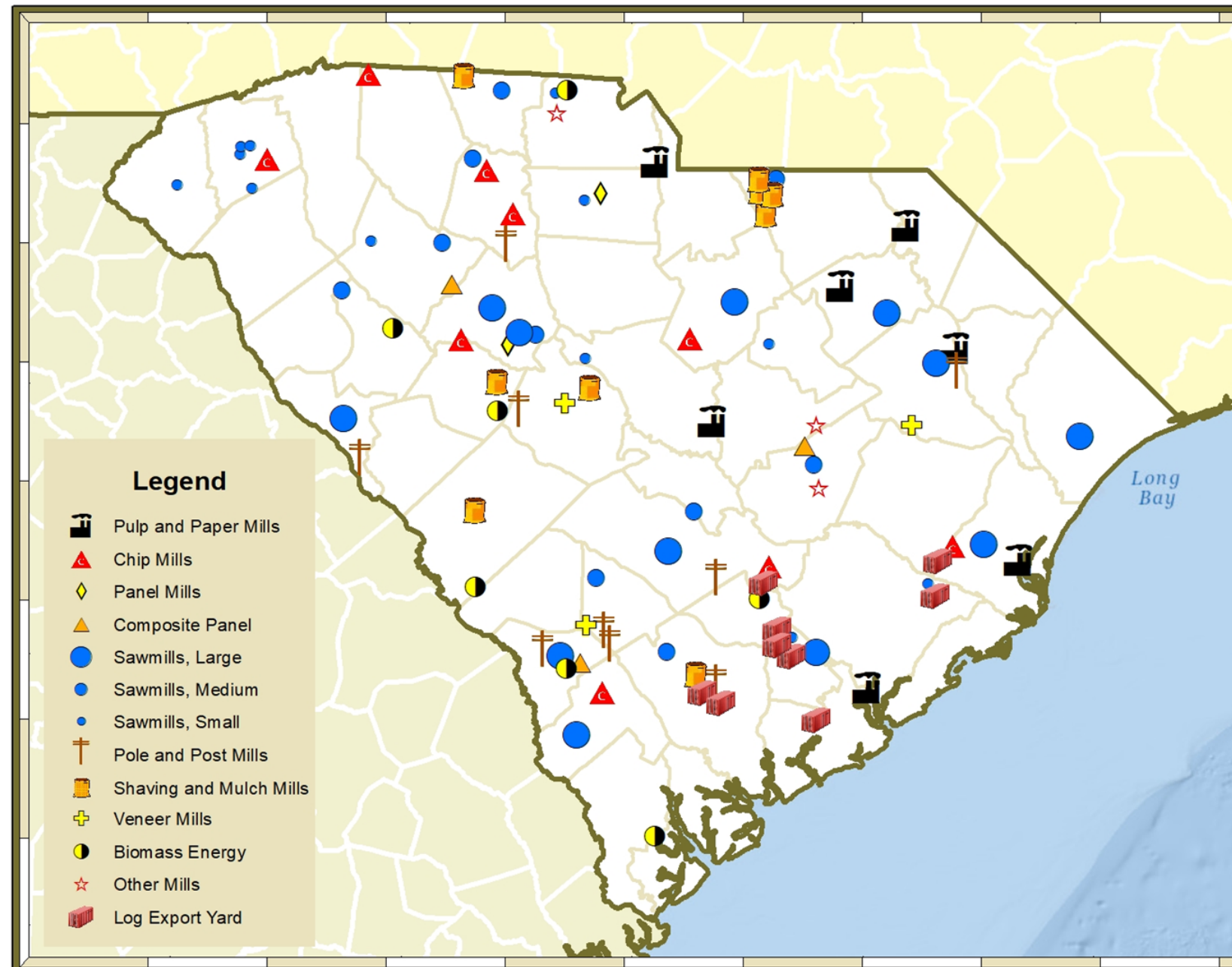
HARDWOOD'S TOP 10 HARVESTED SPECIES



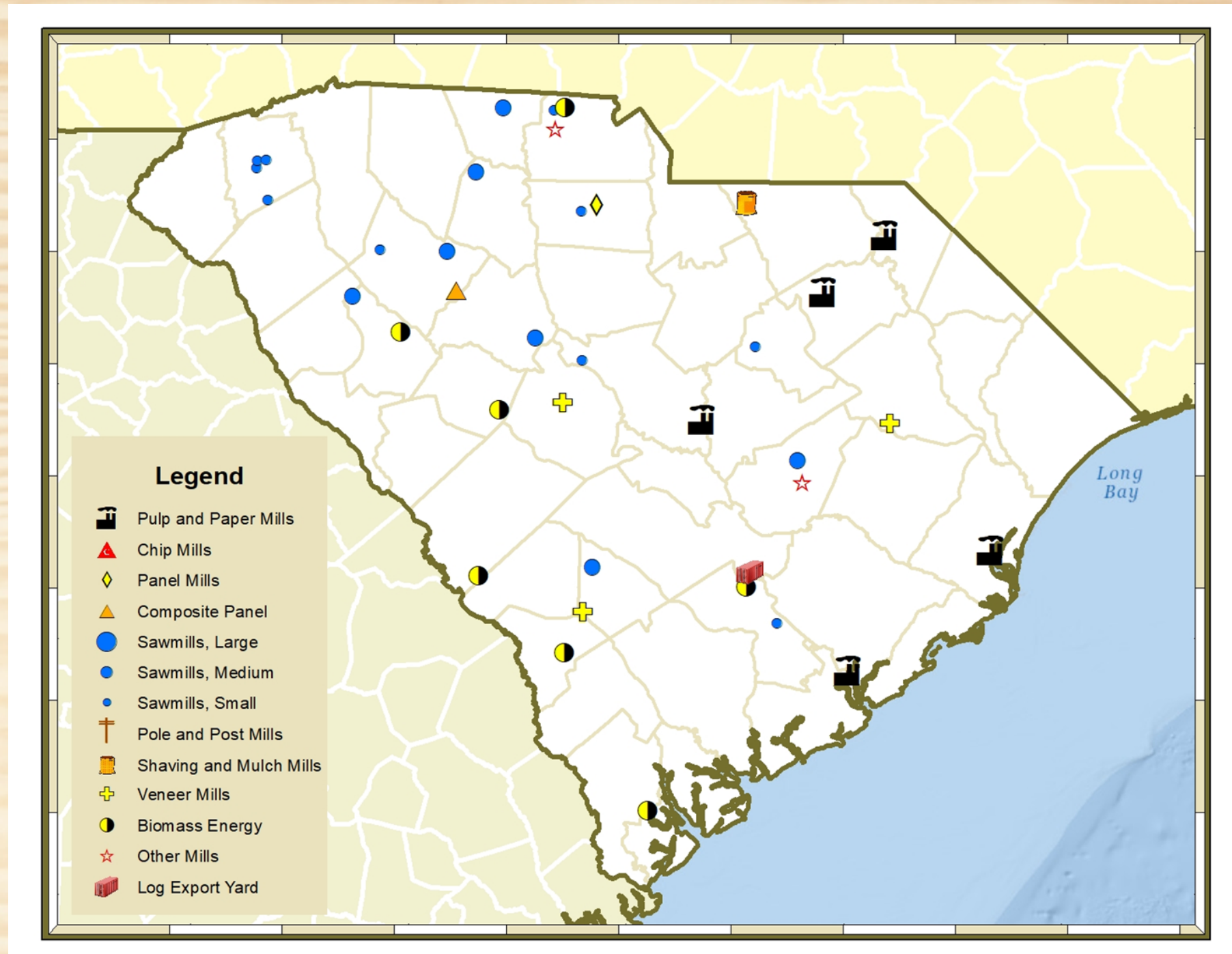
WOOD PRODUCT MANUFACTURING FACILITIES

<u>Primary mills</u>	<u>#</u>
Sawmills	40
Veneer	5
Pulp and paper mills	7
Composite panel board	3
Other	43
TOTAL	98

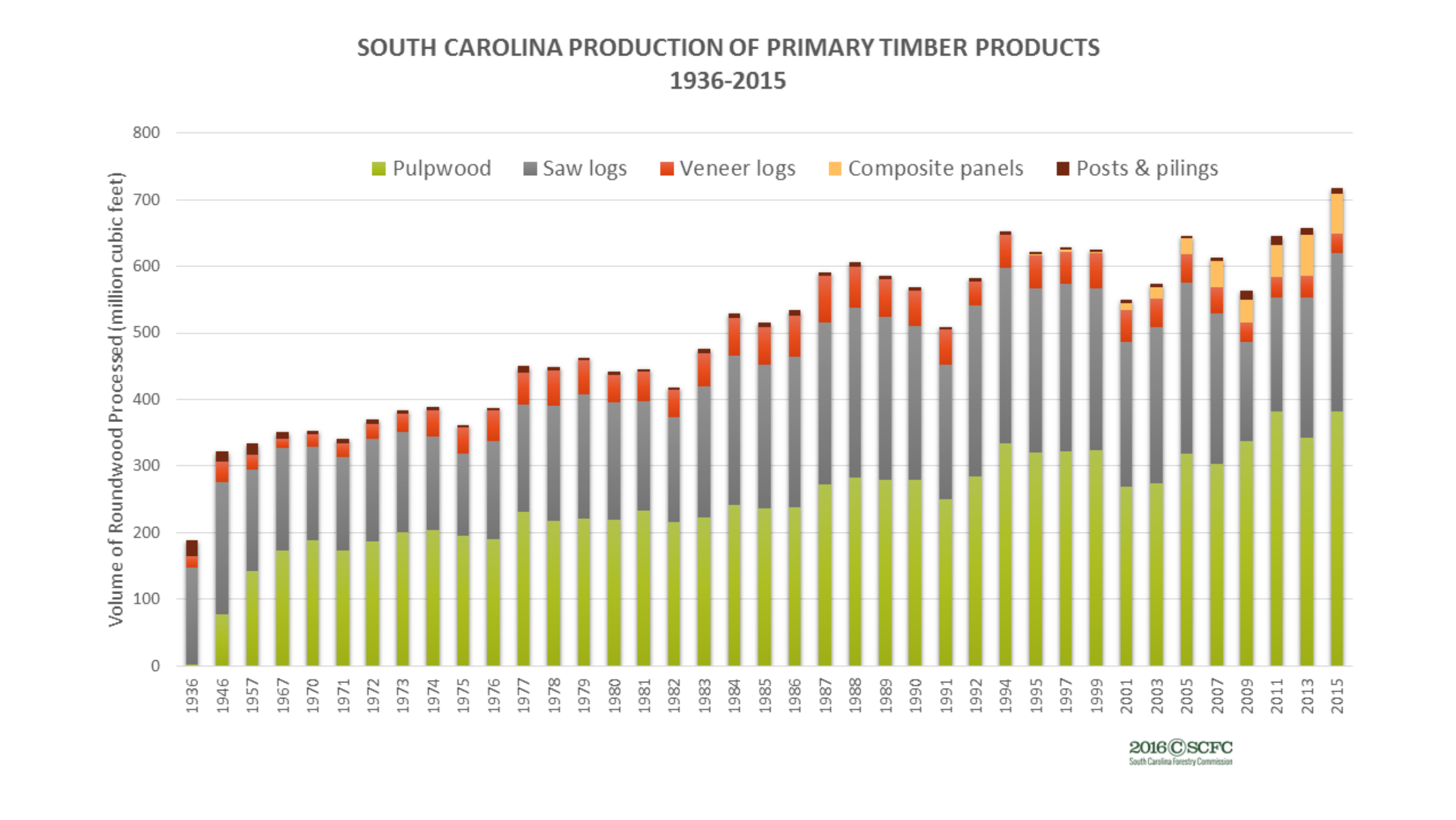
Secondary mills 767



HARDWOOD MANUFACTURING FACILITIES



SC PRODUCTION OF PRIMARY TIMBER PRODUCTS



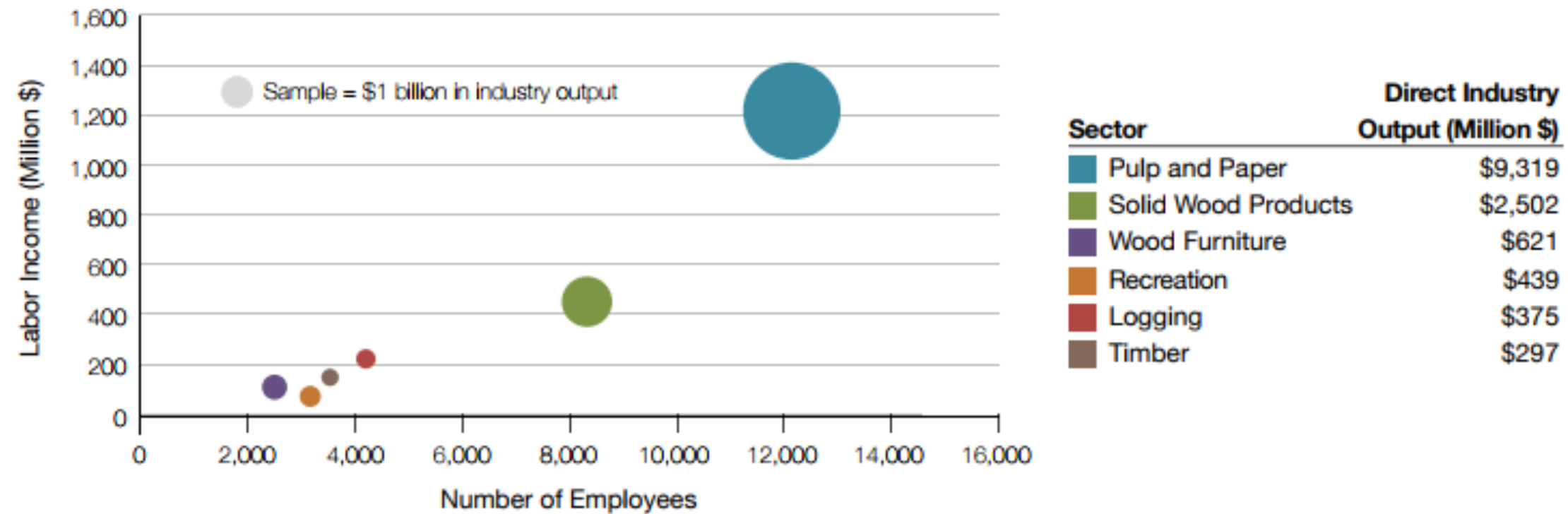
RECENT ESTIMATES OF FORESTRY'S IMPACT IN SC

	TOTAL ECONOMIC IMPACT	VALUE-ADDED (GSP)	EMPLOYMENT	LABOR INCOME
2006 –	\$17.4 BILLION	\$7.0 BILLION	90,624 JOBS	\$4.1 BILLION
2013 –	\$18.6 BILLION	\$6.8 BILLION	90,320 JOBS	\$4.5 BILLION
2015 –	\$21.0 BILLION	\$8.8 BILLION	84,425 JOBS	\$4.5 BILLION

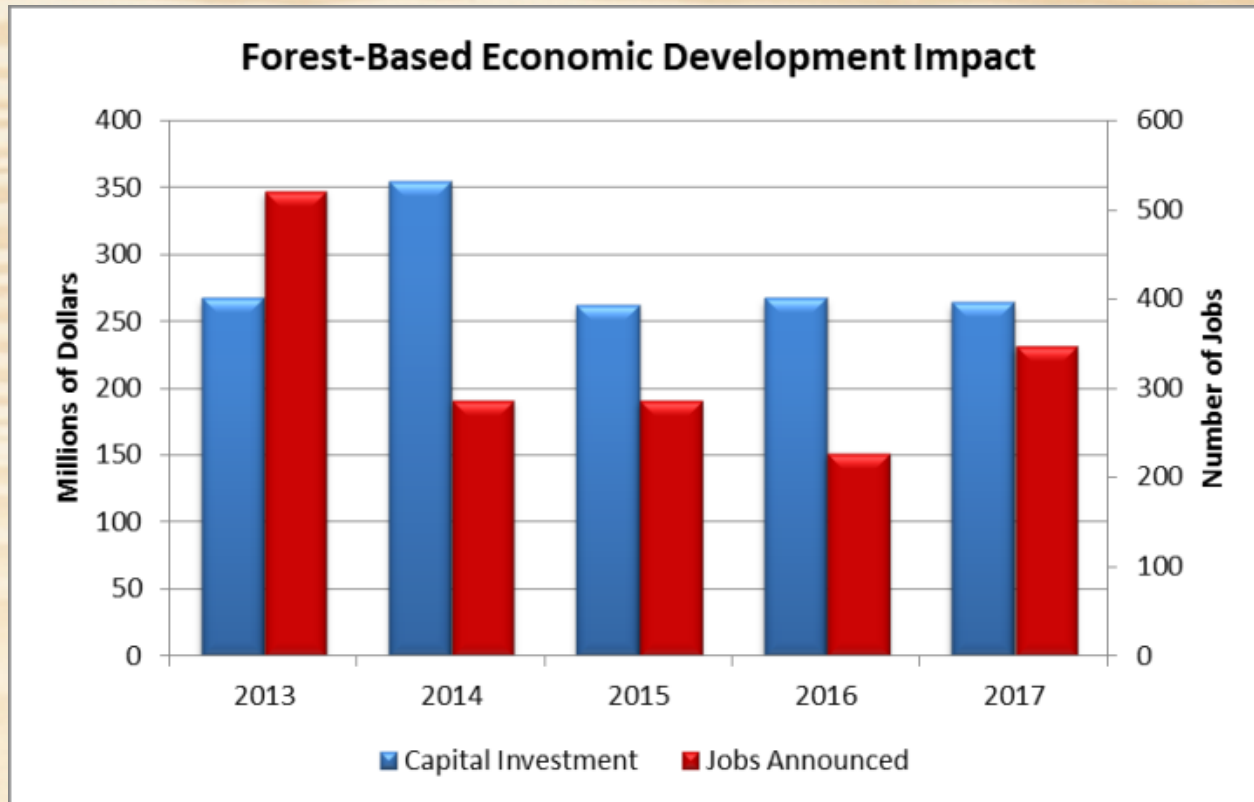


BREAKDOWN OF FORESTRY'S ECONOMIC IMPACT IN SC

Figure 4. Direct economic effects of forestry sectors in South Carolina, 2017.



RECENT SOUTH CAROLINA ANNOUNCEMENTS



FY'17

- ROSEBURG FOREST PRODUCTS – LVL (\$200 MILLION, 145 JOBS)
- WEST FRASER – LUMBER (\$33 MILLION)
- DEMPSEY WOOD PRODUCTS – LUMBER (\$7 MILLION)
- JAMES HARDIE BUILDING PRODUCTS – HARDIE BOARDS (\$15 MILLION, 100 JOBS)

FY'16

- KRONOTEX USA – HDF (\$230 MILLION, 105 JOBS)
- CAROLINA CHIPS – P&P (\$32 MILLION)
- BLACKWATER BARRELS – BOURBON BARRELS (\$3.6 MILLION, 57 JOBS)

FY'15

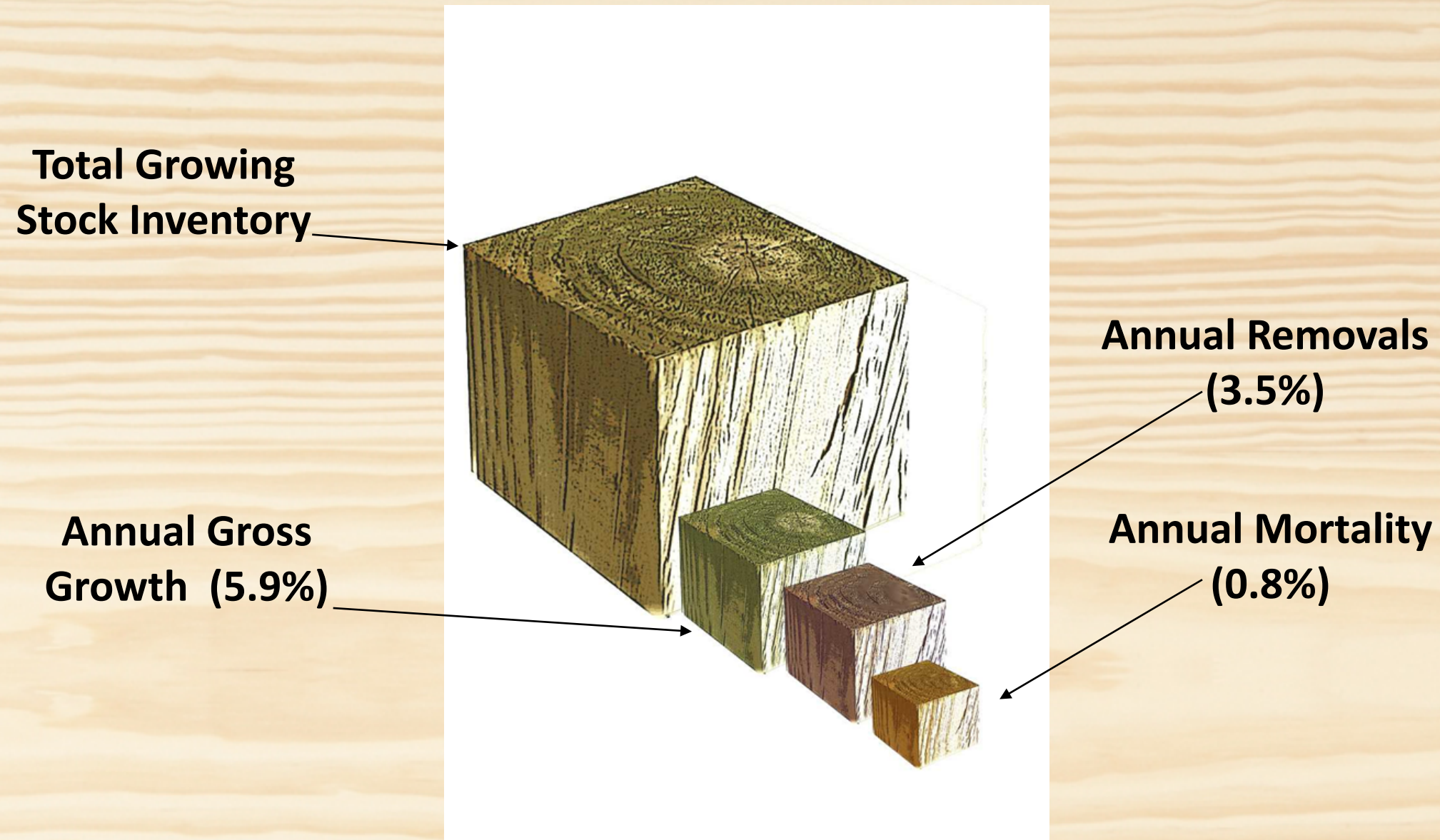
- COLOMBO ENERGY – PELLETS (\$110 MILLION, 70 JOBS)
- ORCHIDS PAPER PRODUCTS – TISSUE (\$110 MILLION, 134 JOBS)



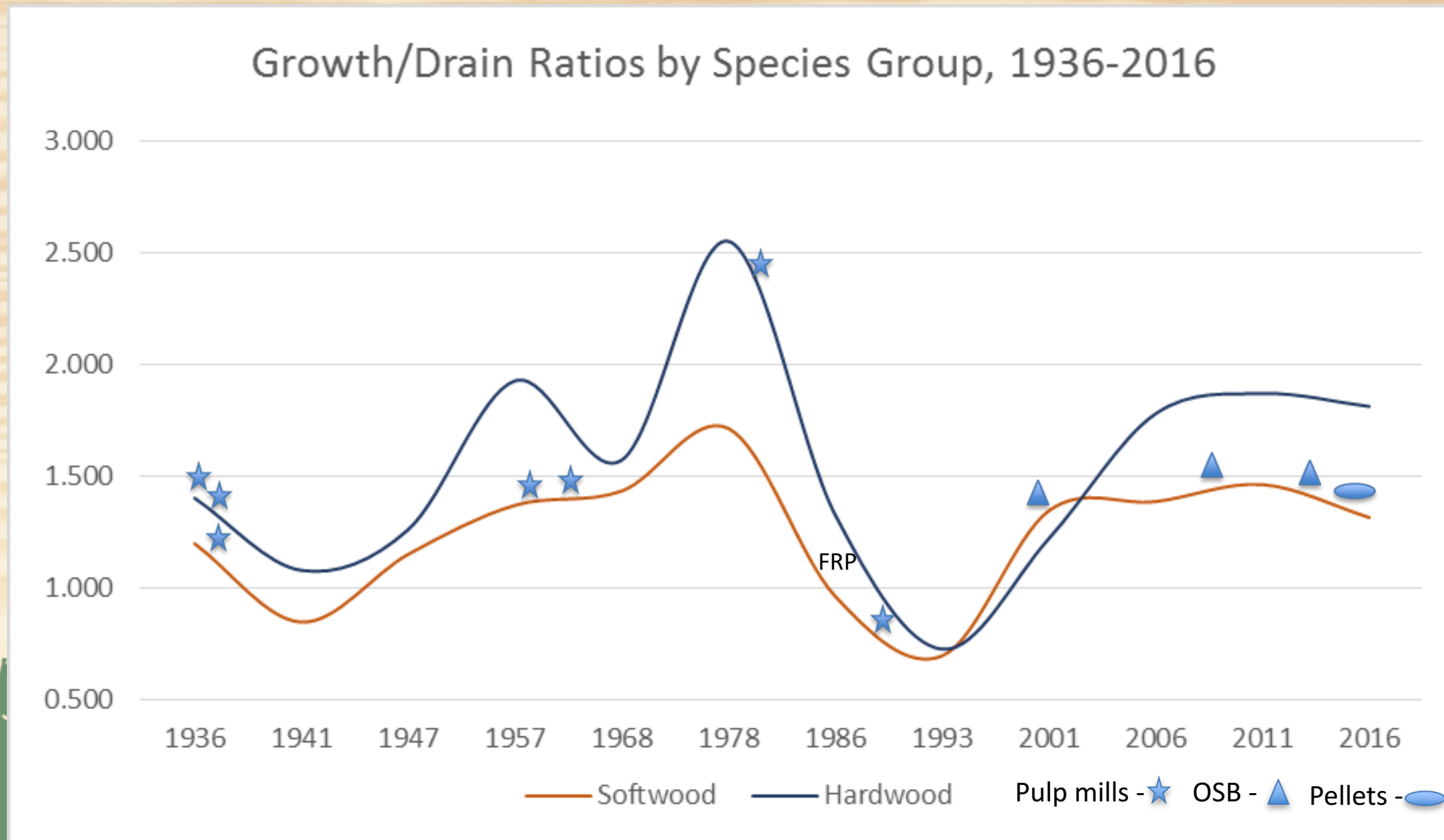
SUSTAINABILITY OF SOUTH CAROLINA'S RESOURCE



SOUTH CAROLINA'S TIMBERLAND INVENTORY IS GROWING 1.6% PER YEAR.



Wood Availability Follows a Cyclic Pattern

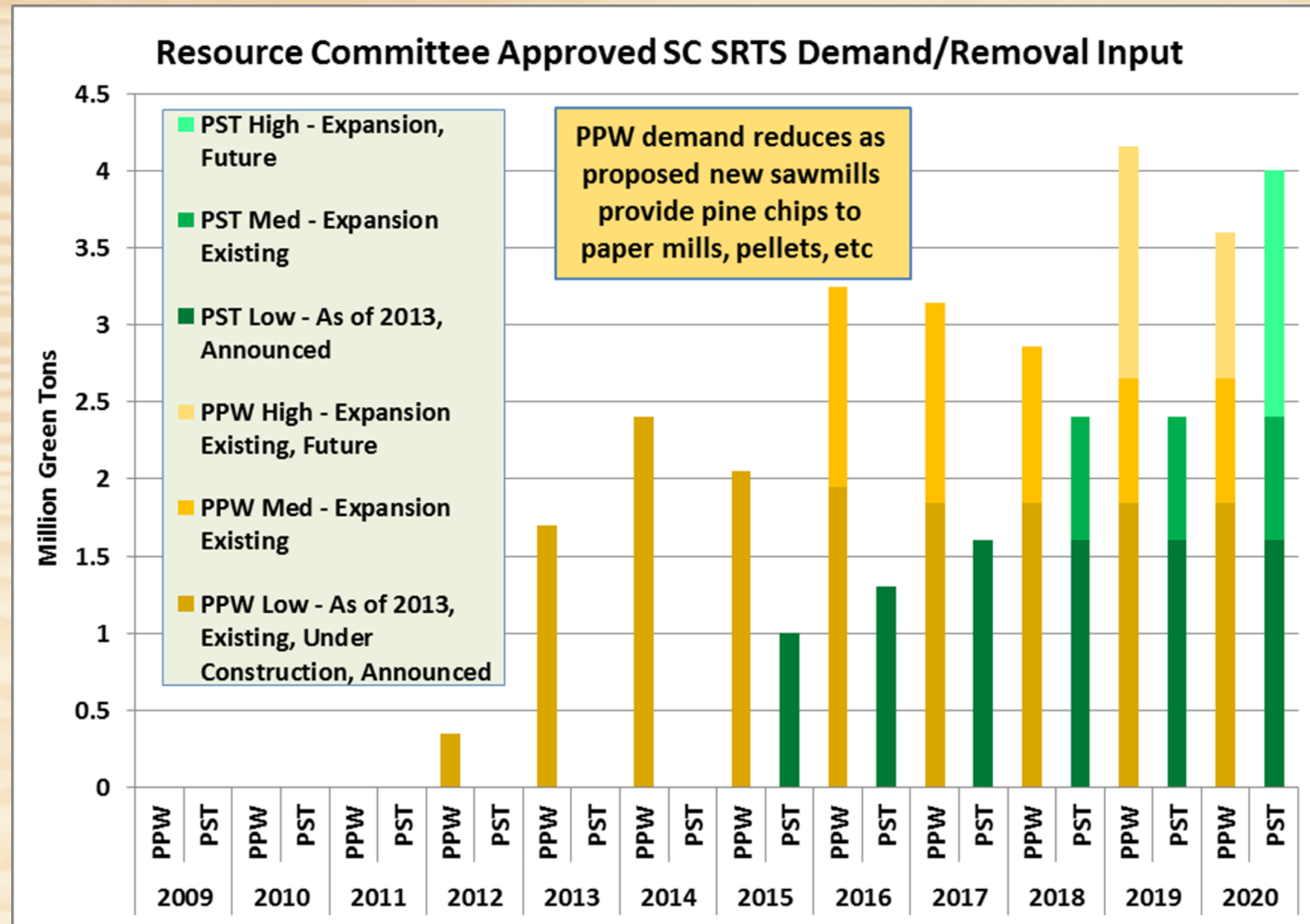


SOUTH CAROLINA WOOD SUPPLY OUTLOOK

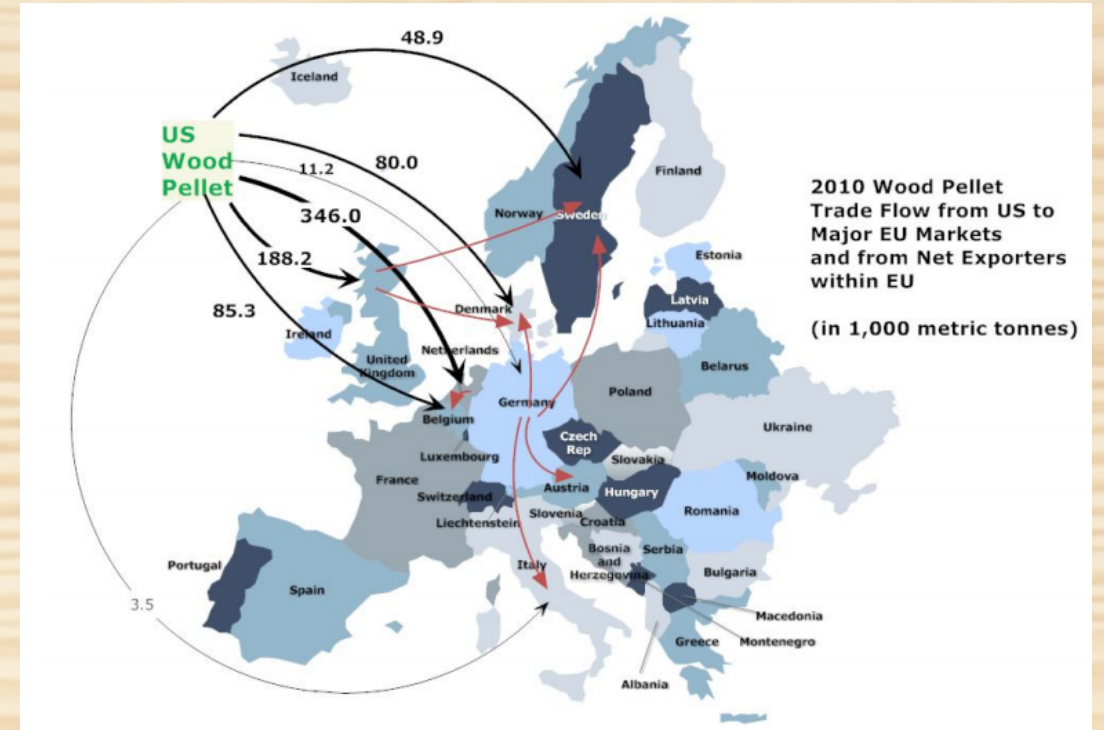
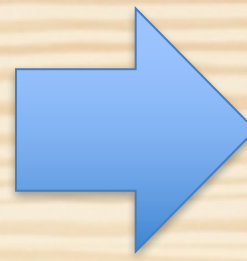
- Oversight by a 10-person committee (Sam Houston, chair)
- Committee make-up balanced among industry sectors
- Forest landowners represented on committee.
- Future wood demand bracketed with High-Medium-Low approach.
- Future wood demand based on realistic expectations.



SUBREGIONAL TIMBER SUPPLY MODEL (SRTS)



GROWTH IN PELLETT MANUFACTURING LEVELING OFF?

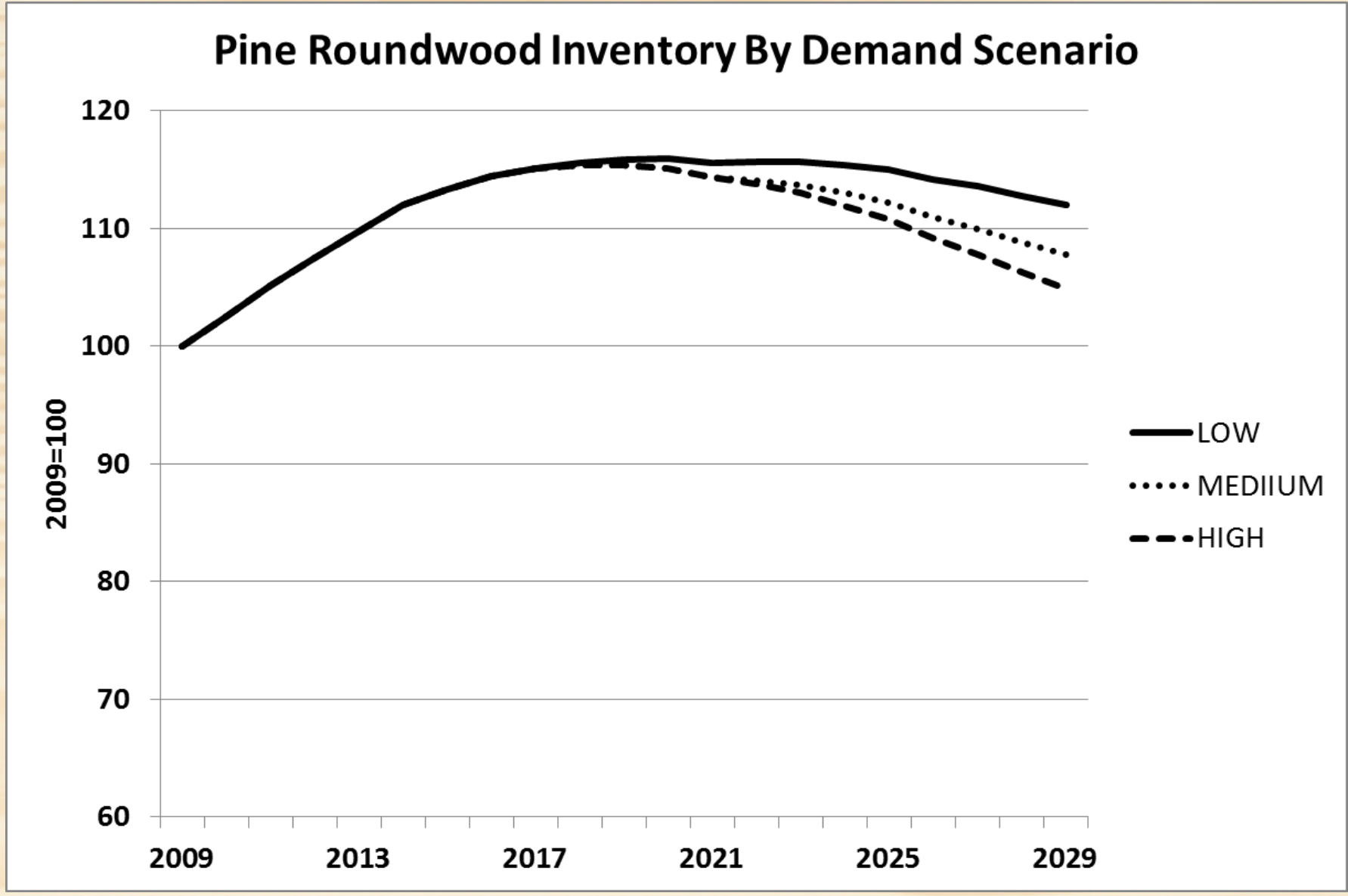


7 NEW SC LOG EXPORT OPERATIONS

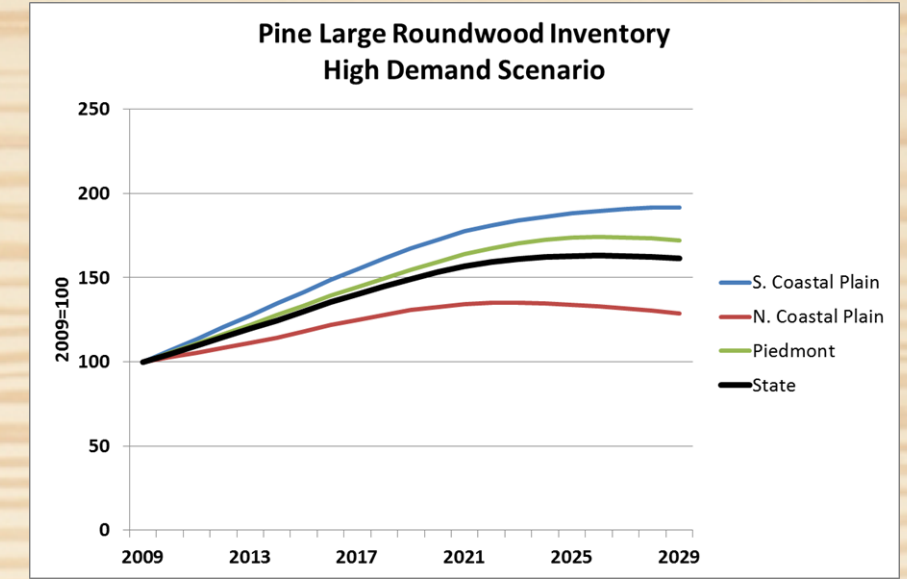


TOTAL WOOD INVENTORY WILL CONTINUE TO GROW

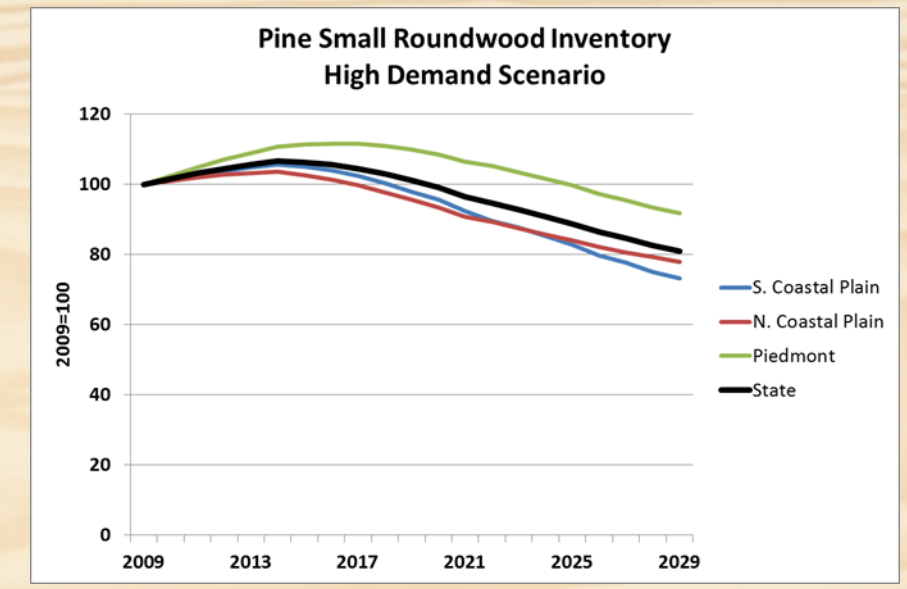
Pine Roundwood Inventory By Demand Scenario



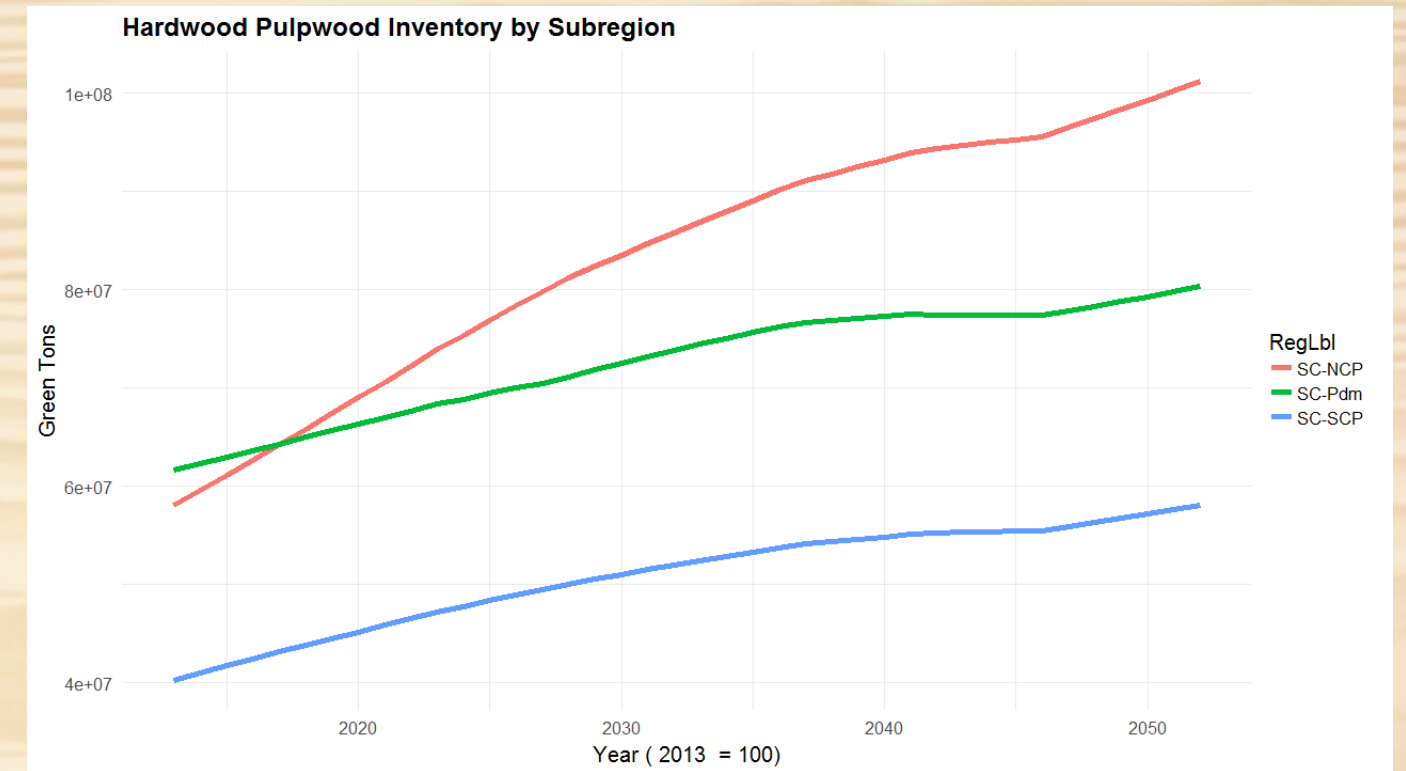
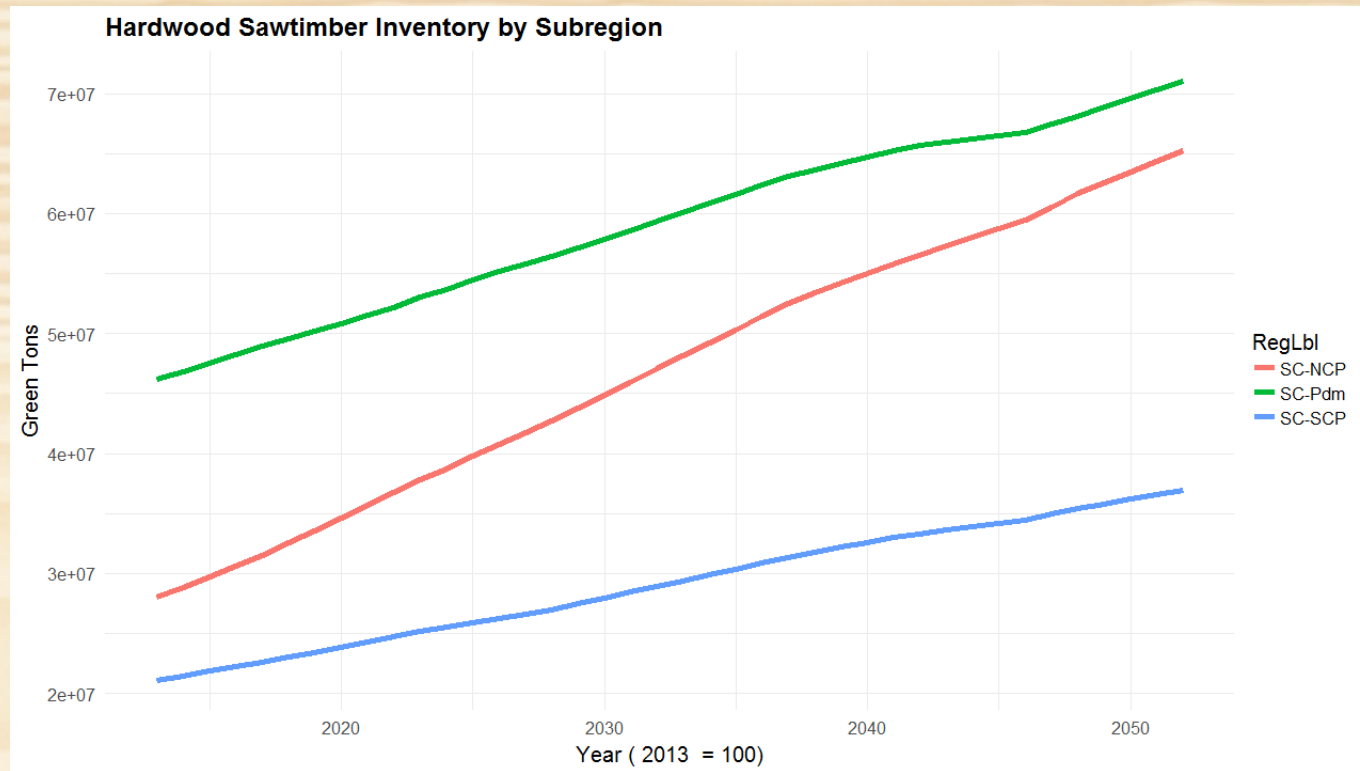
Pine Large Roundwood Inventory High Demand Scenario



Pine Small Roundwood Inventory High Demand Scenario



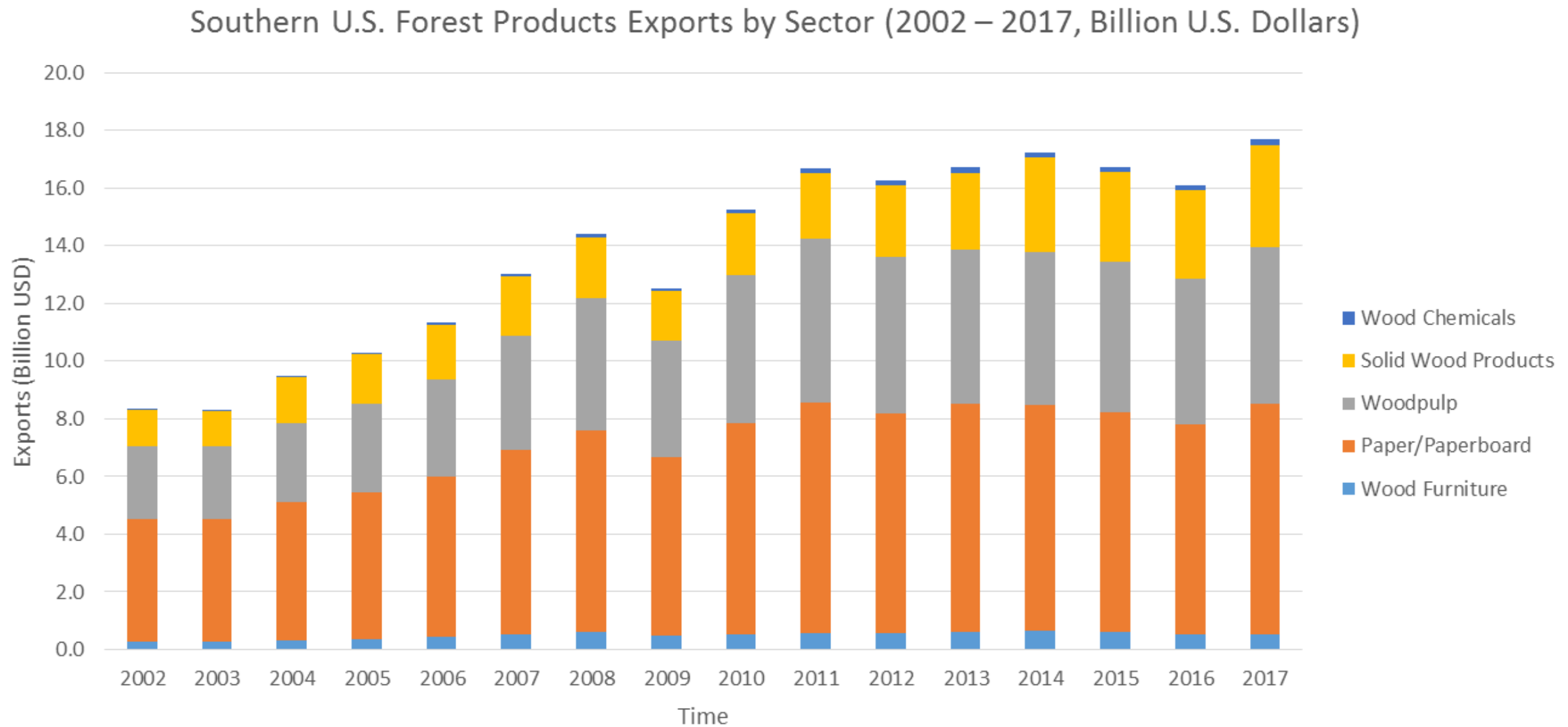
HARDWOOD SUPPLY WILL CONTINUE TO GROW



SOUTH CAROLINA'S GLOBAL REACH



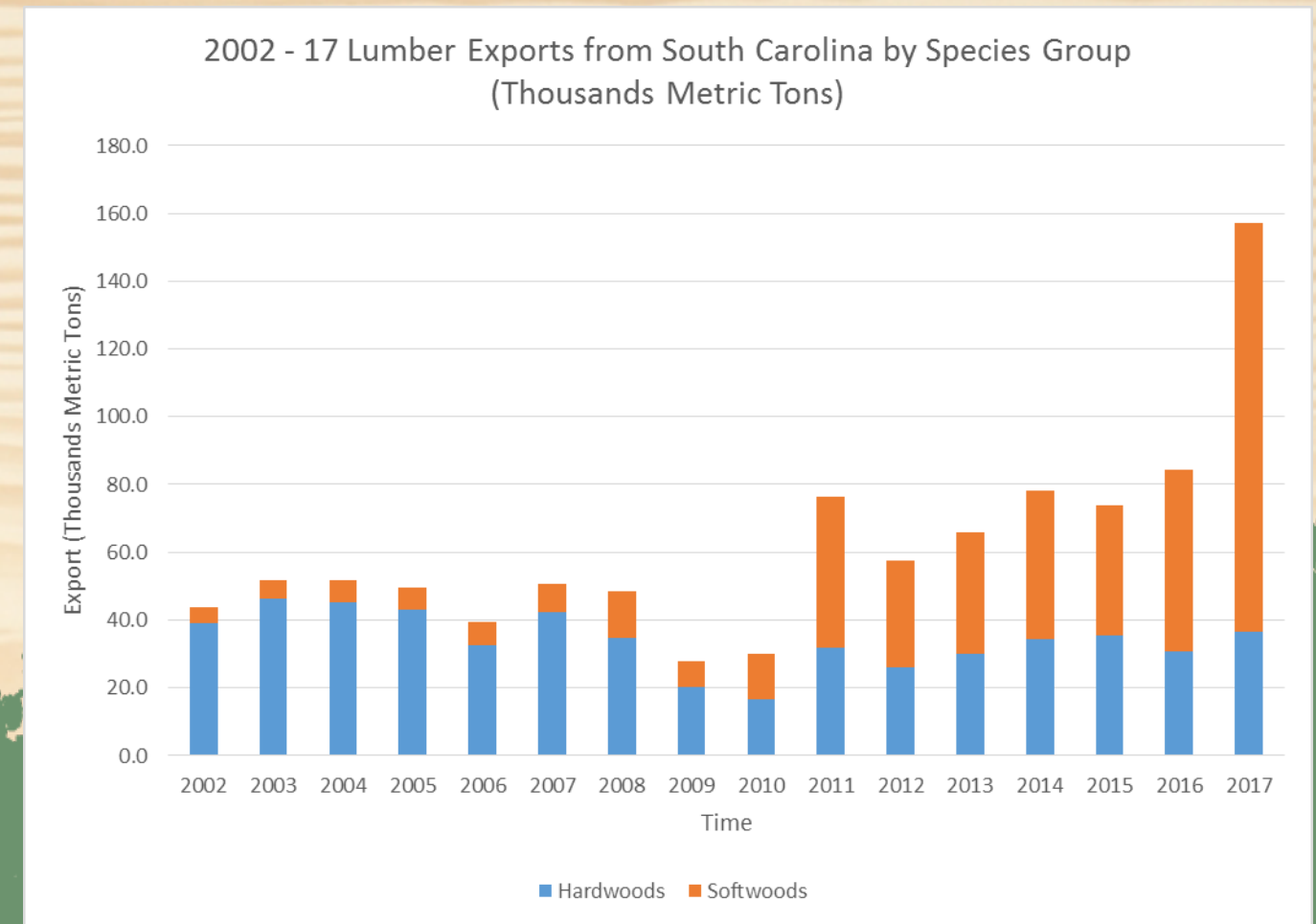
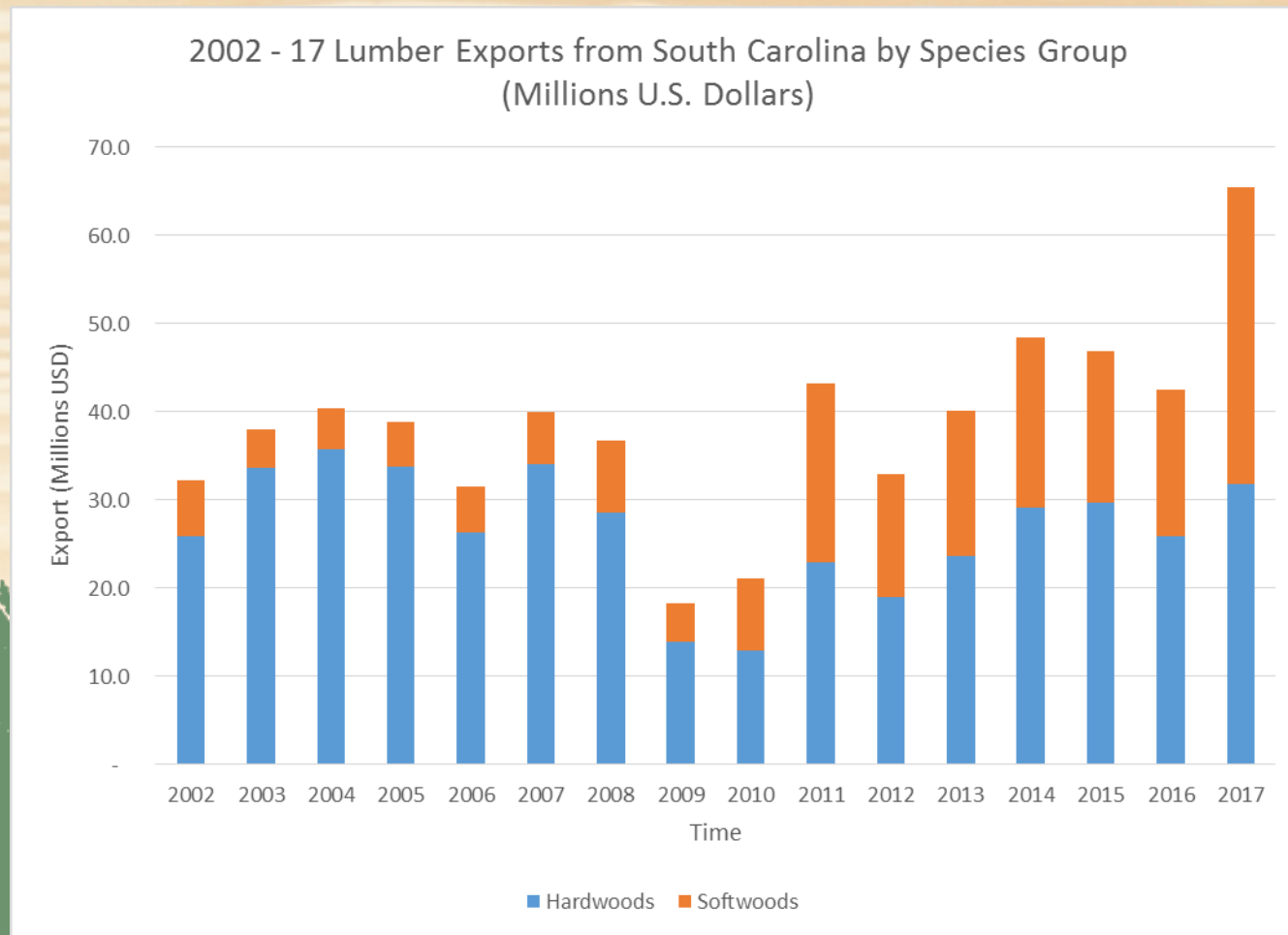
FOREST PRODUCT EXPORTS FROM THE U.S. SOUTH ARE AT RECORD HIGHS



LUMBER EXPORTS FROM SOUTH CAROLINA BY VALUE & VOLUME

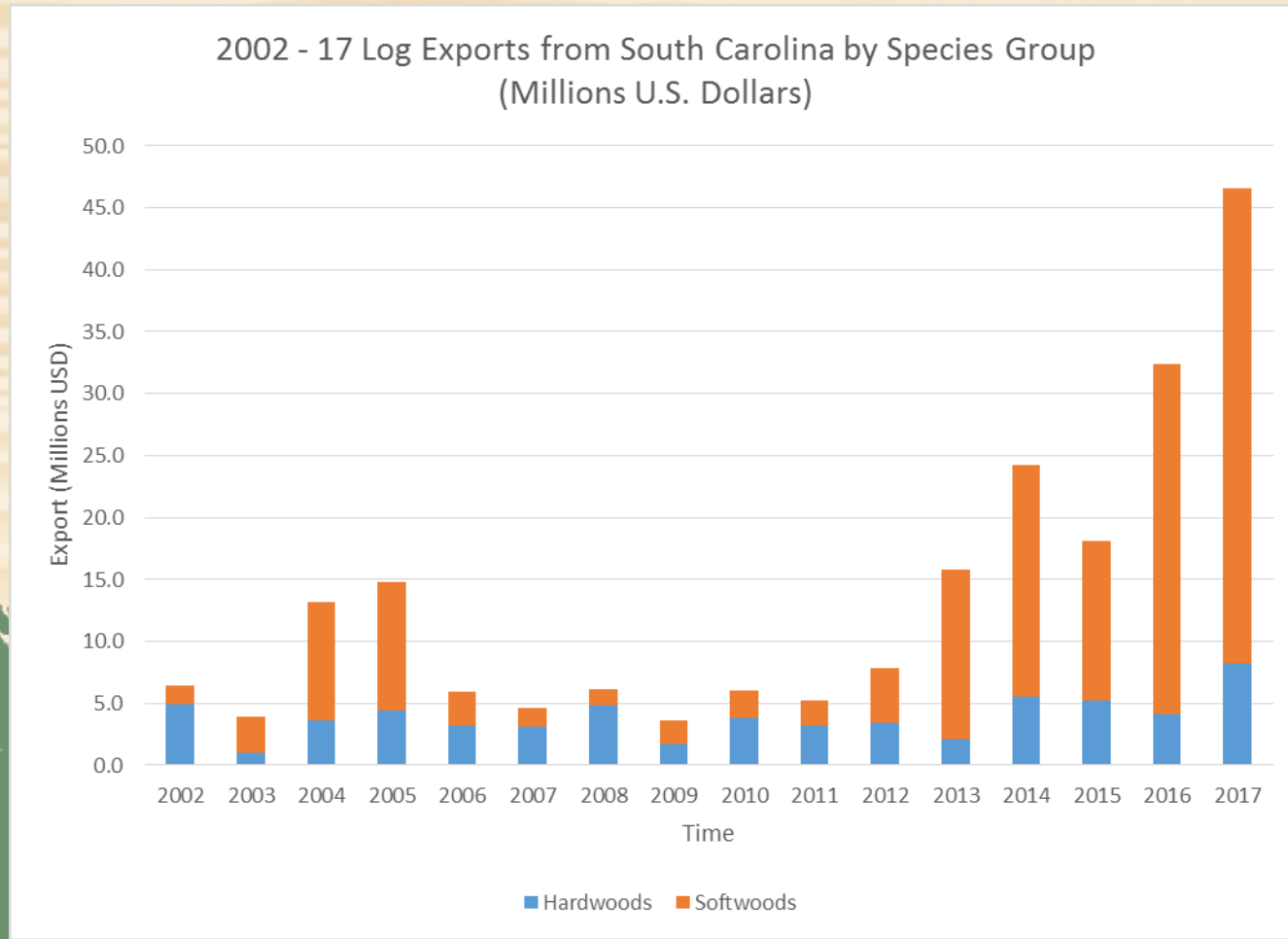
VALUE

VOLUME

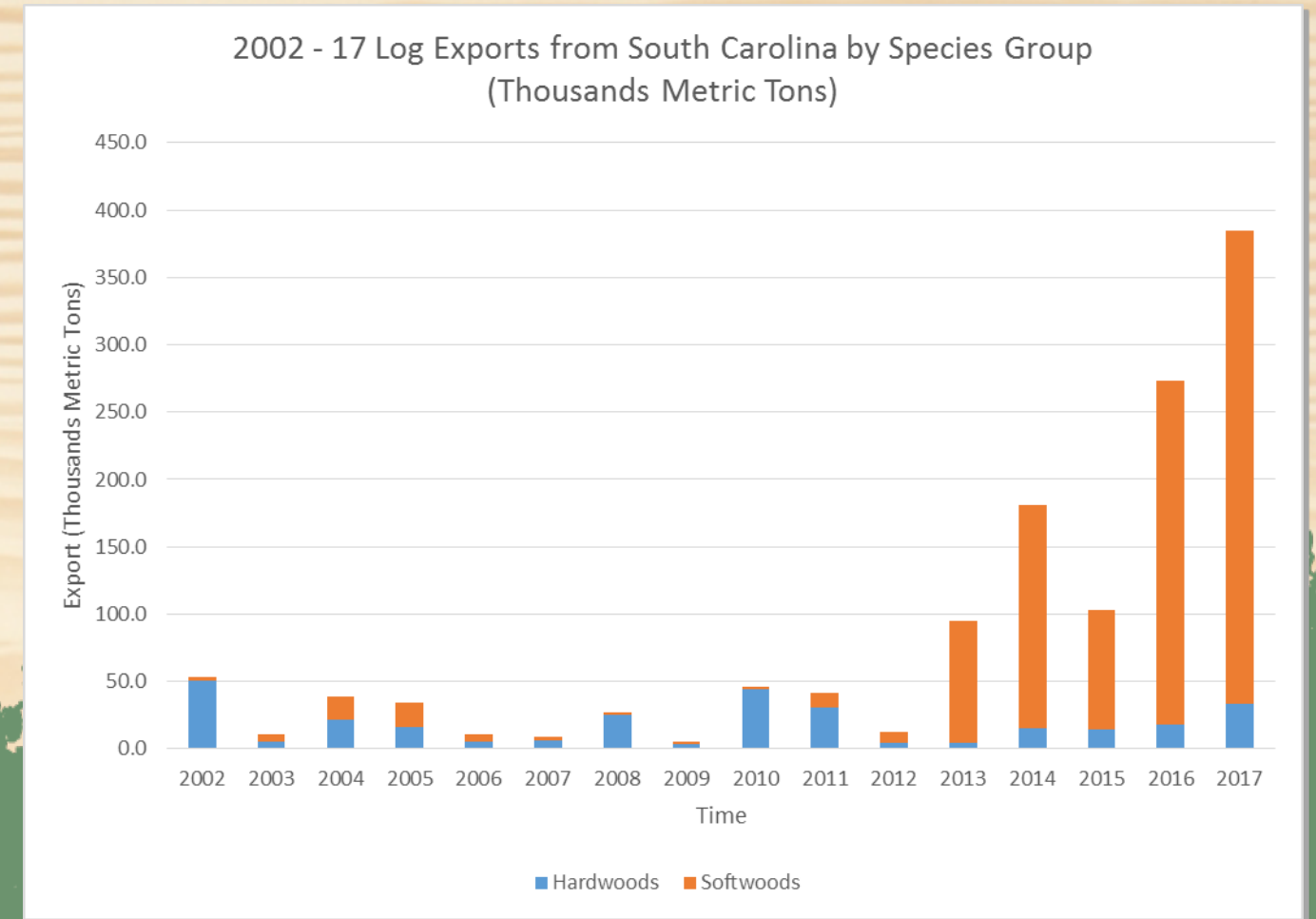


LOG EXPORTS FROM SOUTH CAROLINA BY VALUE & VOLUME

VALUE



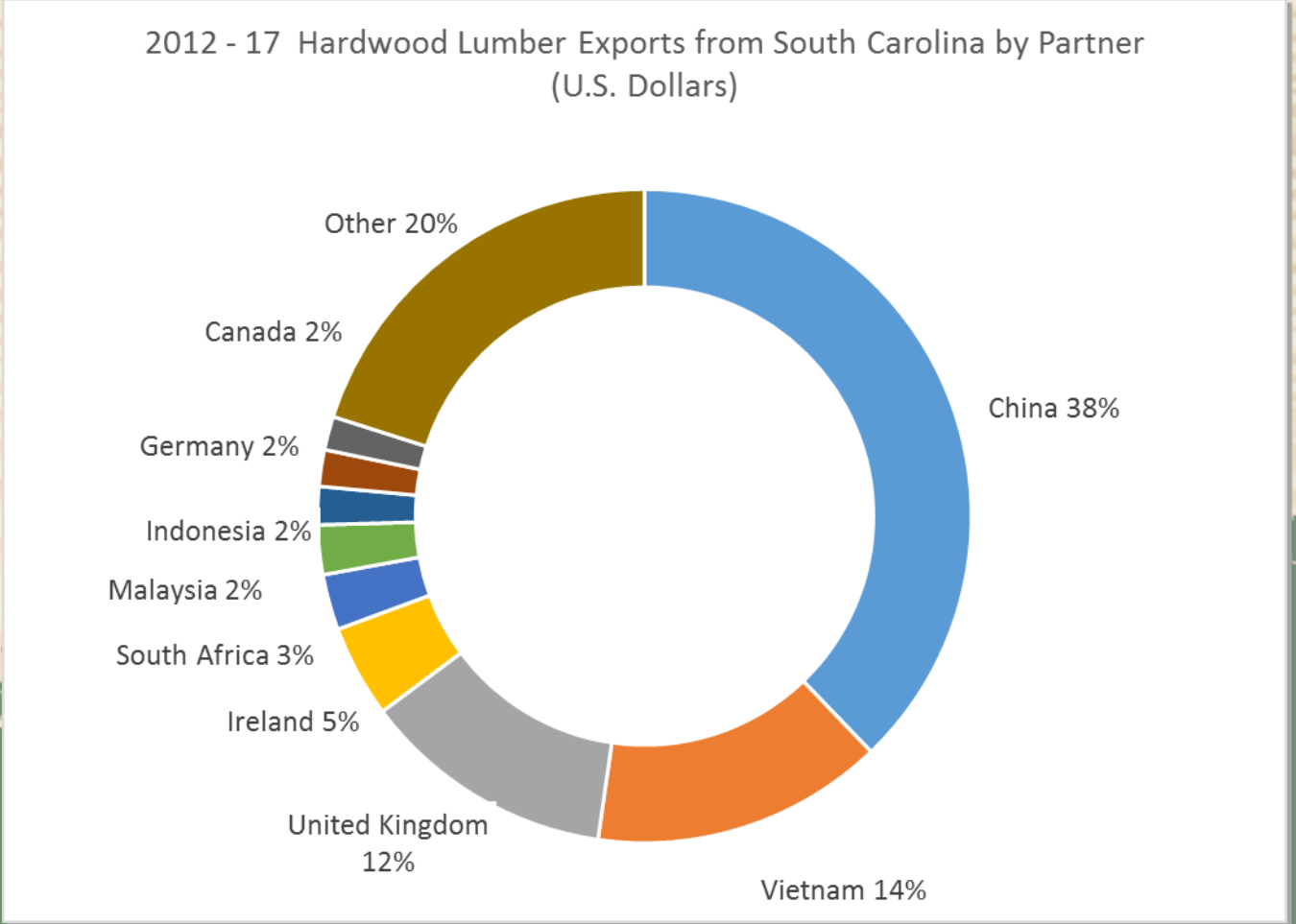
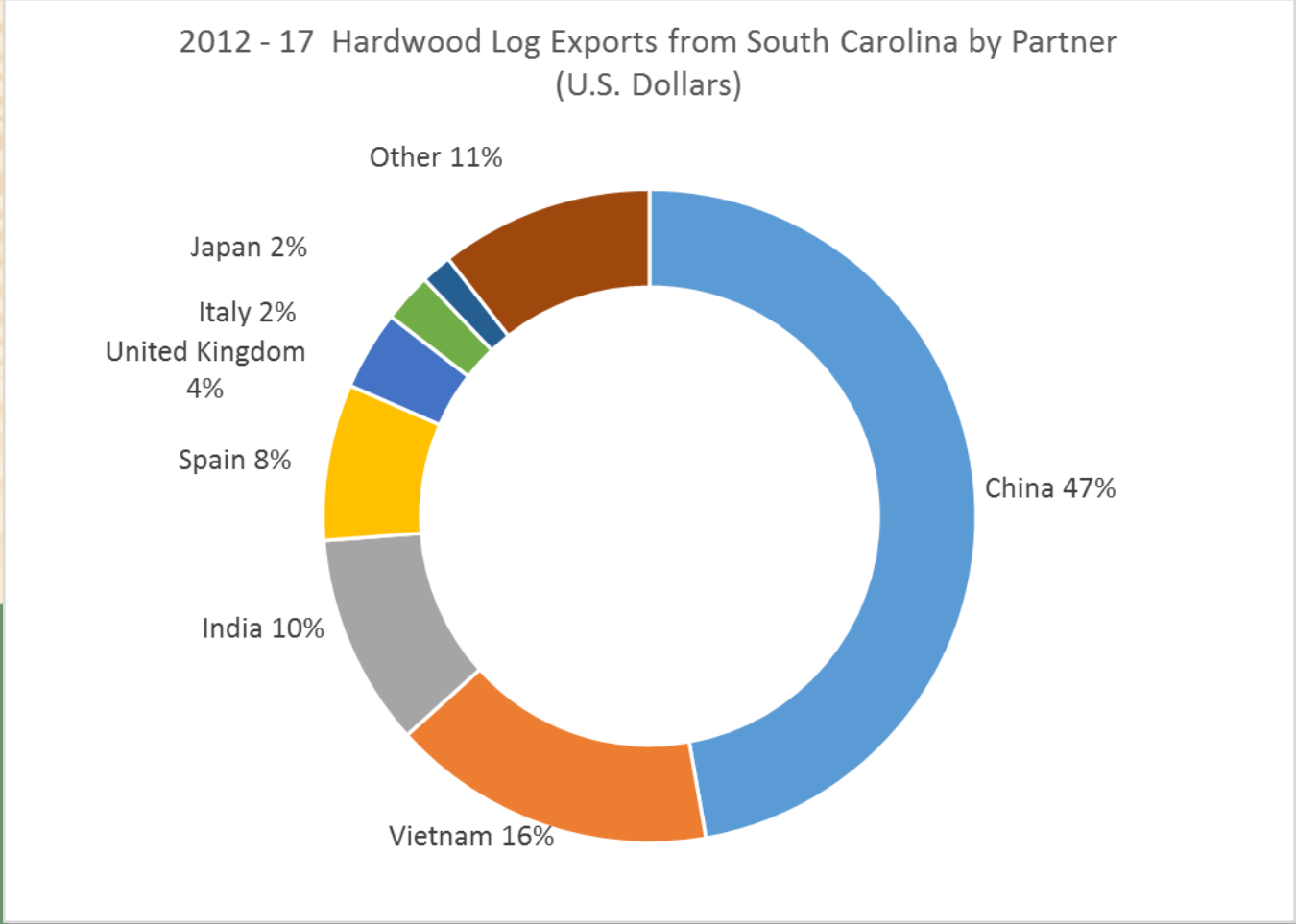
VOLUME



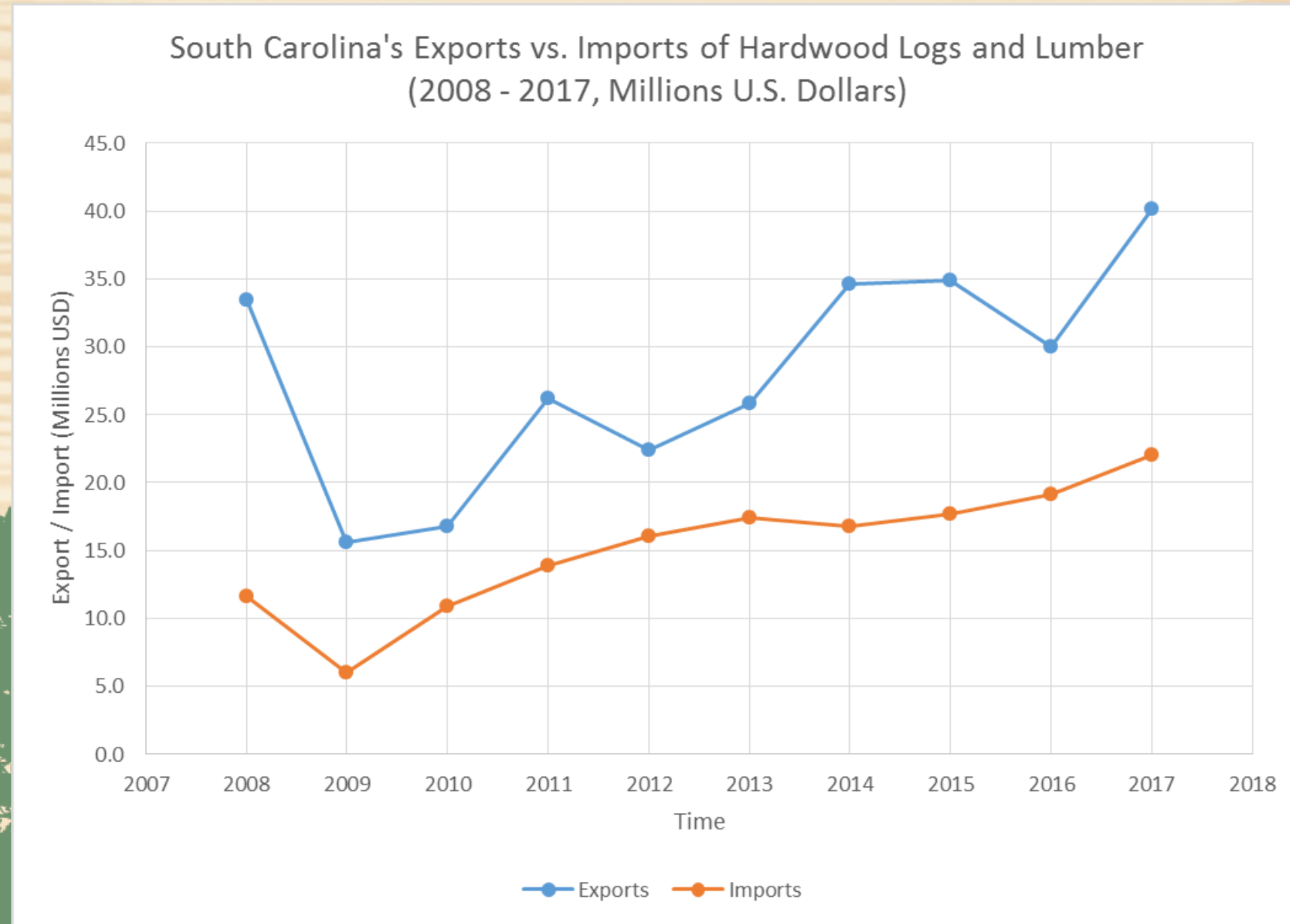
HARDWOOD LOG AND LUMBER EXPORTS FROM SOUTH CAROLINA BY DESTINATION

LOGS

LUMBER



SOUTH CAROLINA IS A NET EXPORTER OF HARDWOOD LOGS AND LUMBER



- MANY NATIONAL & REGIONAL FOREST RESOURCE TRENDS FIT SC
 - SC FORESTS HAVE MORE WOOD THAN EVER RECORDED
 - SC'S FOREST INDUSTRY IS MORE PRODUCTIVE THAN EVER.
- PROJECTIONS SHOW SC'S CONTINUED STRENGTH IN SAWTIMBER
 - THE SOUTH IS THE WOODBASKET TO THE WORLD



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