SC FORESTRY

A GROWING INDUSTRY

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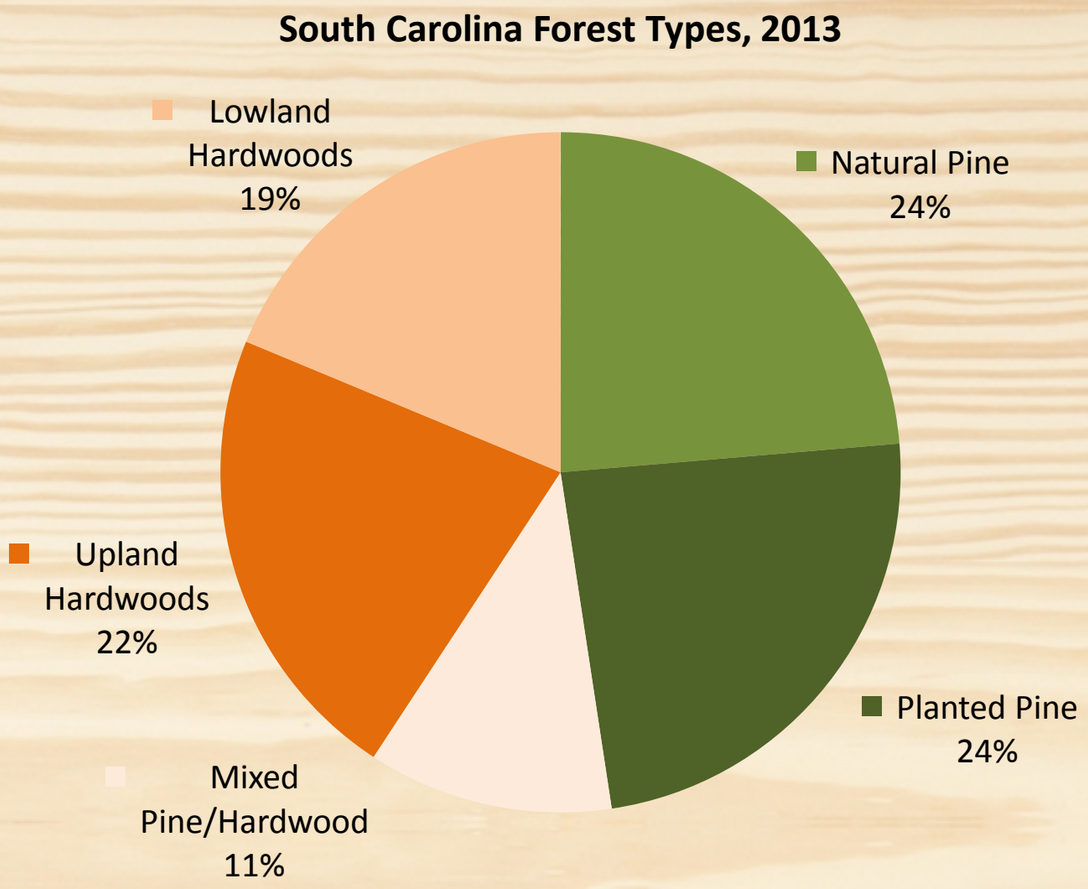
SC FOREST FACTS

- 13.1 million acres of forestland
- 67% of SC's land area is forested
- 52% hardwood / 48% pine types
- 24% planted pine, producing >50% of timber supply
- 88% private / 12% public
- 300,000 family forest owners (86,000 own >10 acres)
- Growth exceeds harvest
- Timber volumes at record levels
- Unbalanced pine age-class structure

SC HAS THE MOST UP-TO-DATE FIA DATA

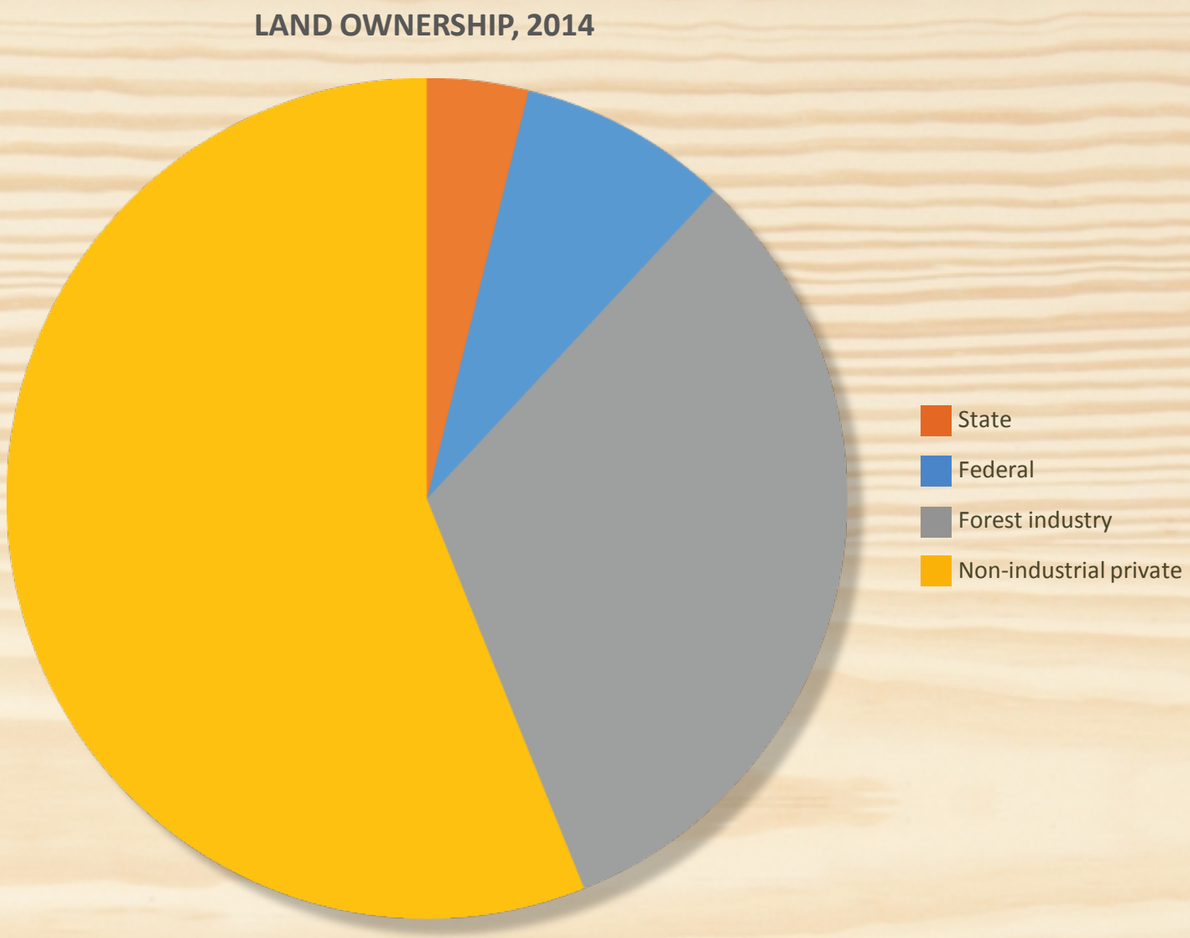
- Describes the extent and condition of the state's forests.
- Completed 10 surveys between 1936 and 2011.
- Data collected by SC Forestry Commission
- Data analyzed and published by USFS

SC's FORESTS ARE BALANCED AND DIVERSE



PRIVATE LANDOWERS ARE KEY TO WOOD SUPPLY

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



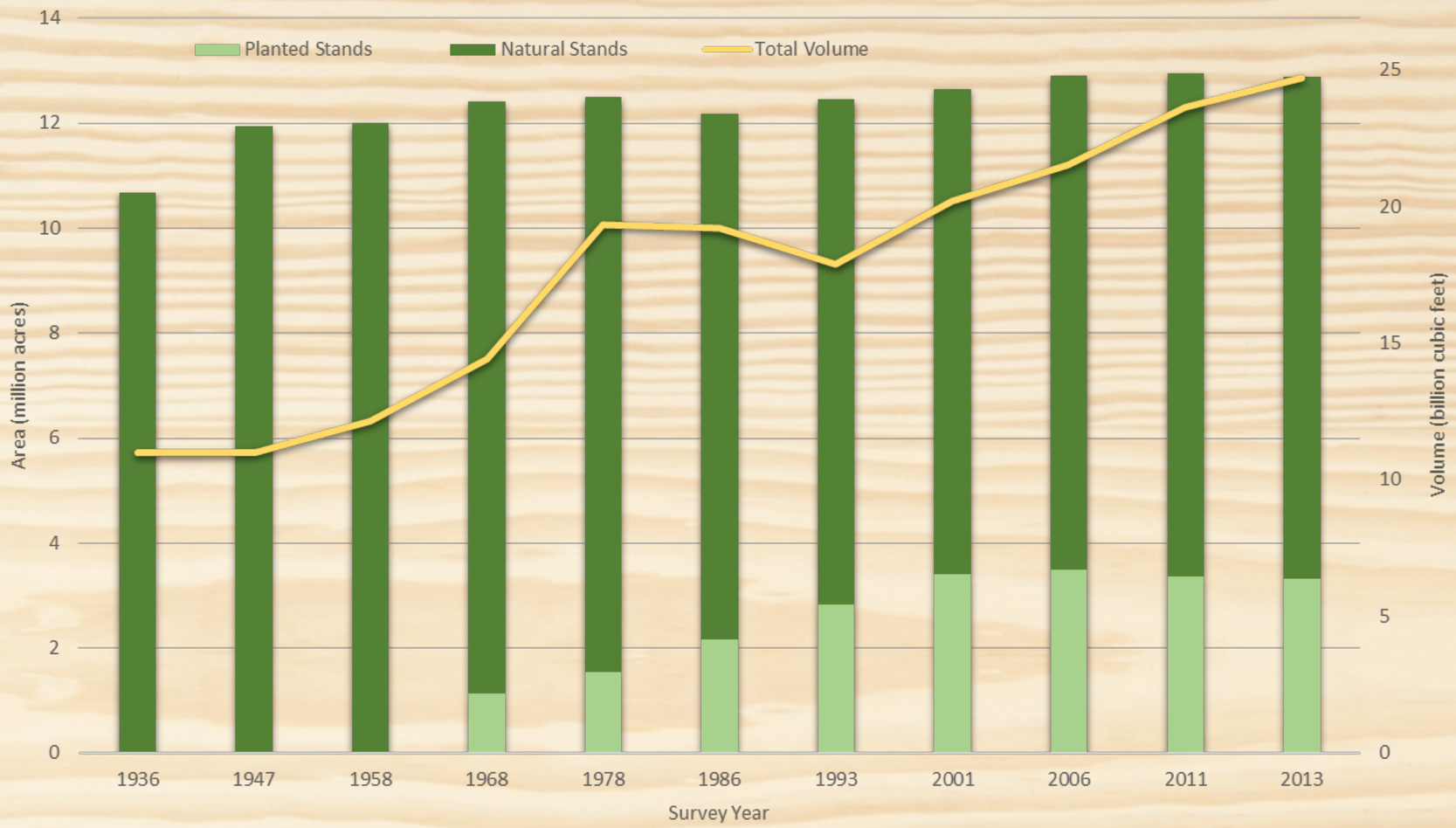
SC FAMILY FOREST LANDOWNER STATS

- 14,000 forest family landowners have a written forest management plan.
- 11,000 have implemented elements of their plan.
- 61% of the plans were written by private consultants.
- Reasons given for not having a plan:
  - Don’t need one
  - Too busy to be bothered
  - They are too expensive
  - Too complicated.

Size of Woodland Holdings	Acres	Number of Ownerships
10-19	319,000	26,000
20-49	797,000	28,000
50-99	893,000	15,000
100-199	1,211,000	9,000
200-499	1,594,000	6,000
500-999	733,000	1,000
1,000-4,999	1,211,000	<1,000
5,000-9,999	96,000	<1,000
10,000+	32,000	<1,000
Total	6,885,000	86,000

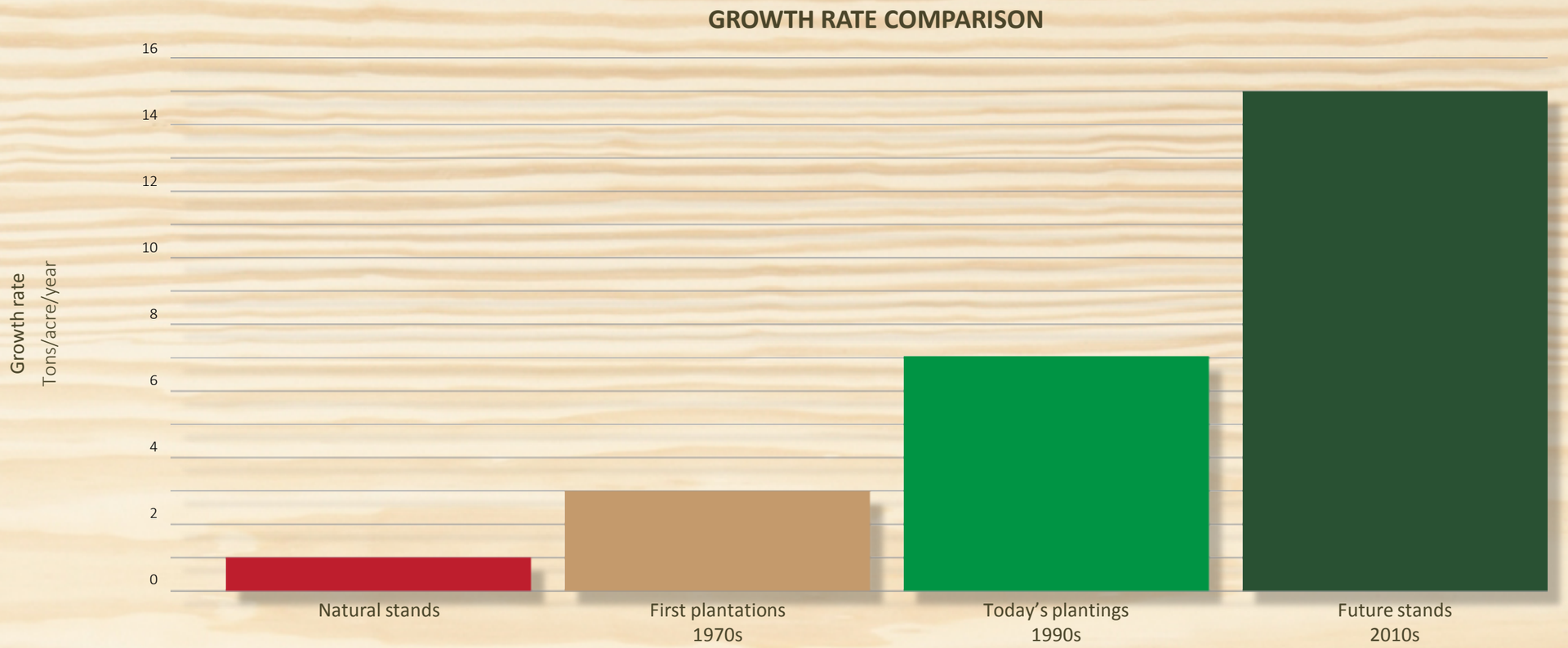
SC TIMBERLAND ACREAGE STABLE

Wood volume increasing at record levels



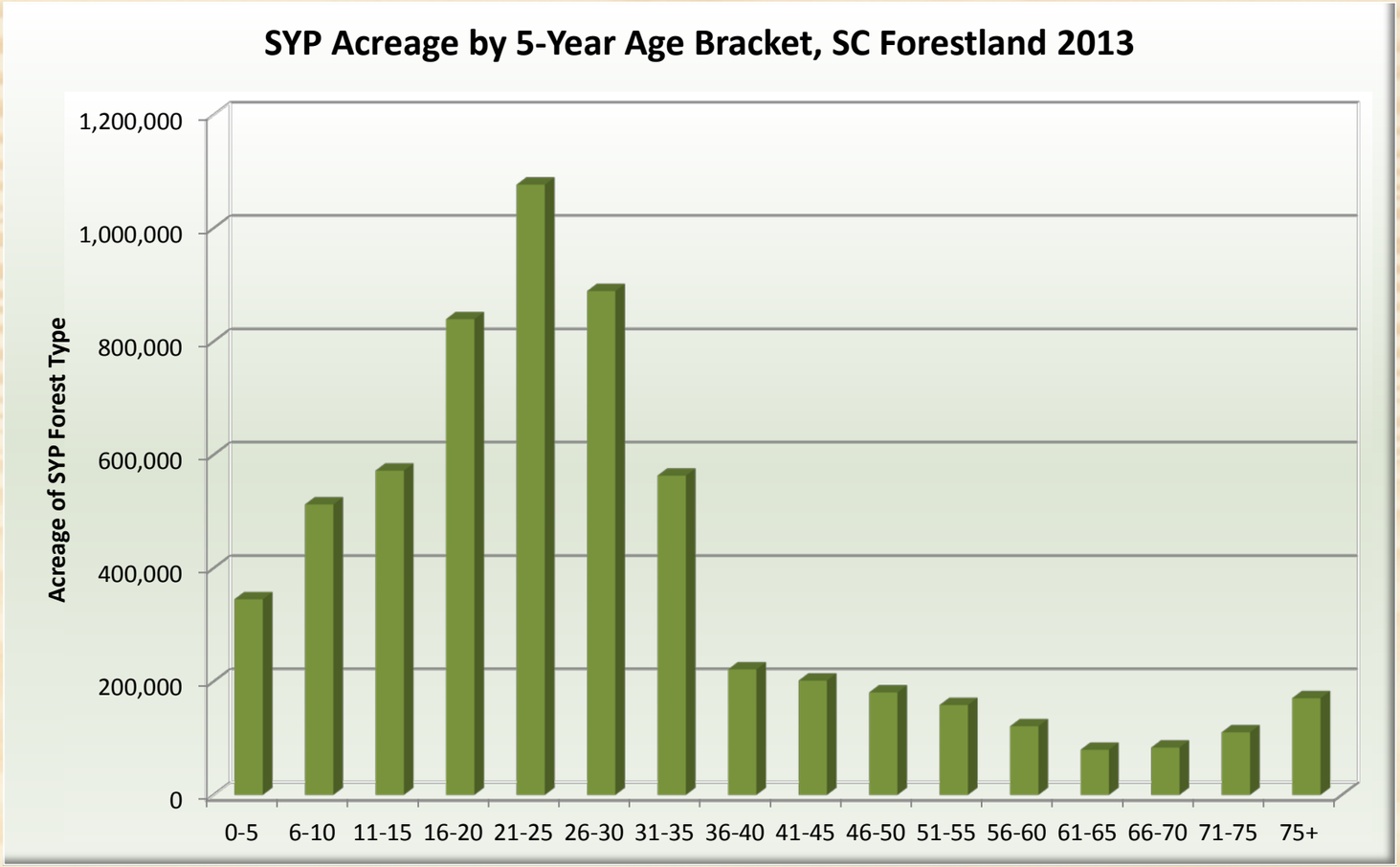
PLANT GENETICALLY IMPROVED TREES

…and actively manage them!



HUGO AND CRP CREATED A "WALL OF WOOD"

…and uneven age structure

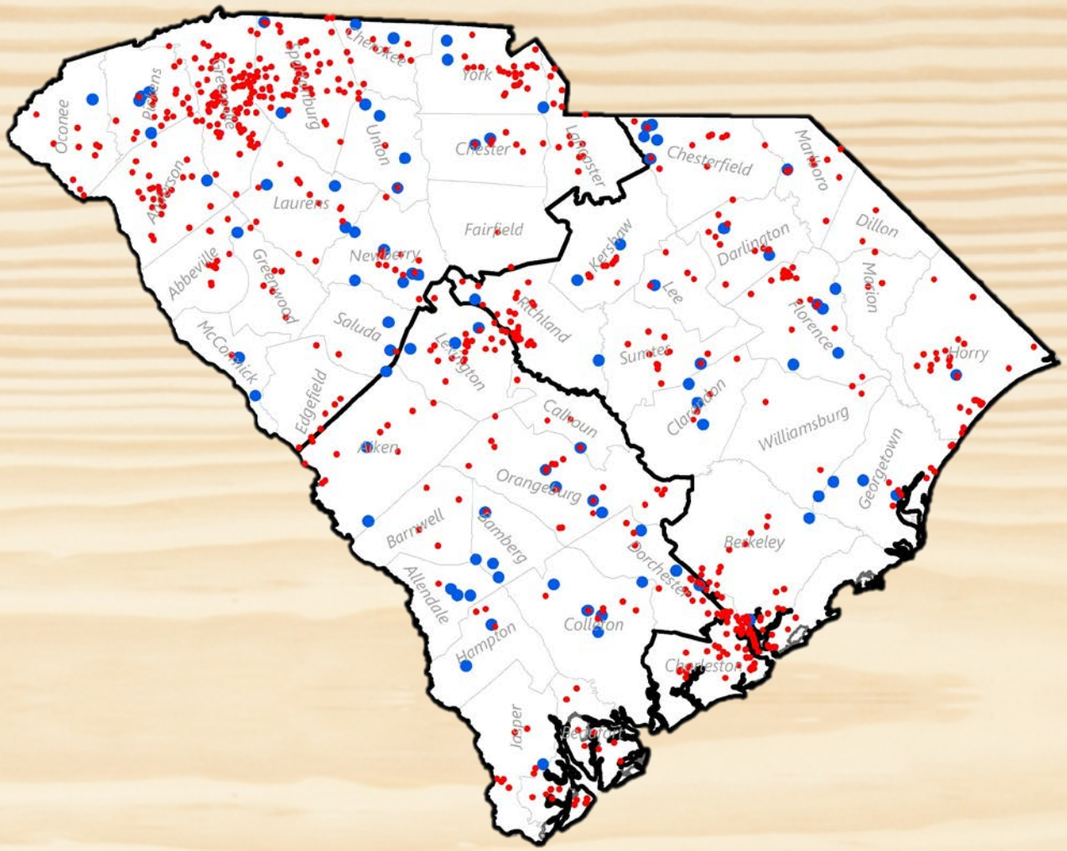


WOOD PRODUCT MFG. FACILITIES

PRIMARY AND SECONDARY WOOD-USING MILLS, 2015

Primary mills	#
Sawmills	40
Veneer	5
Pulp and paper mills	7
Composite panel board	3
Other	39
TOTAL	94

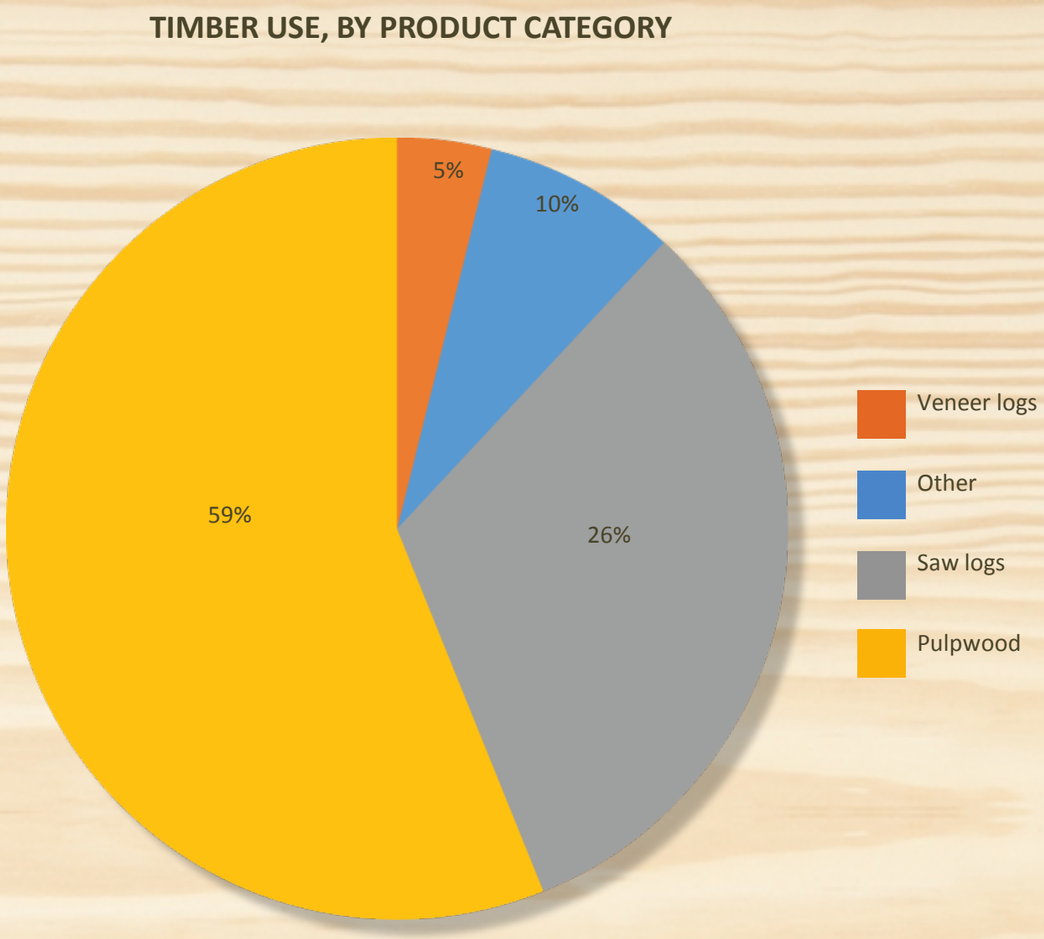
Secondary mills	725



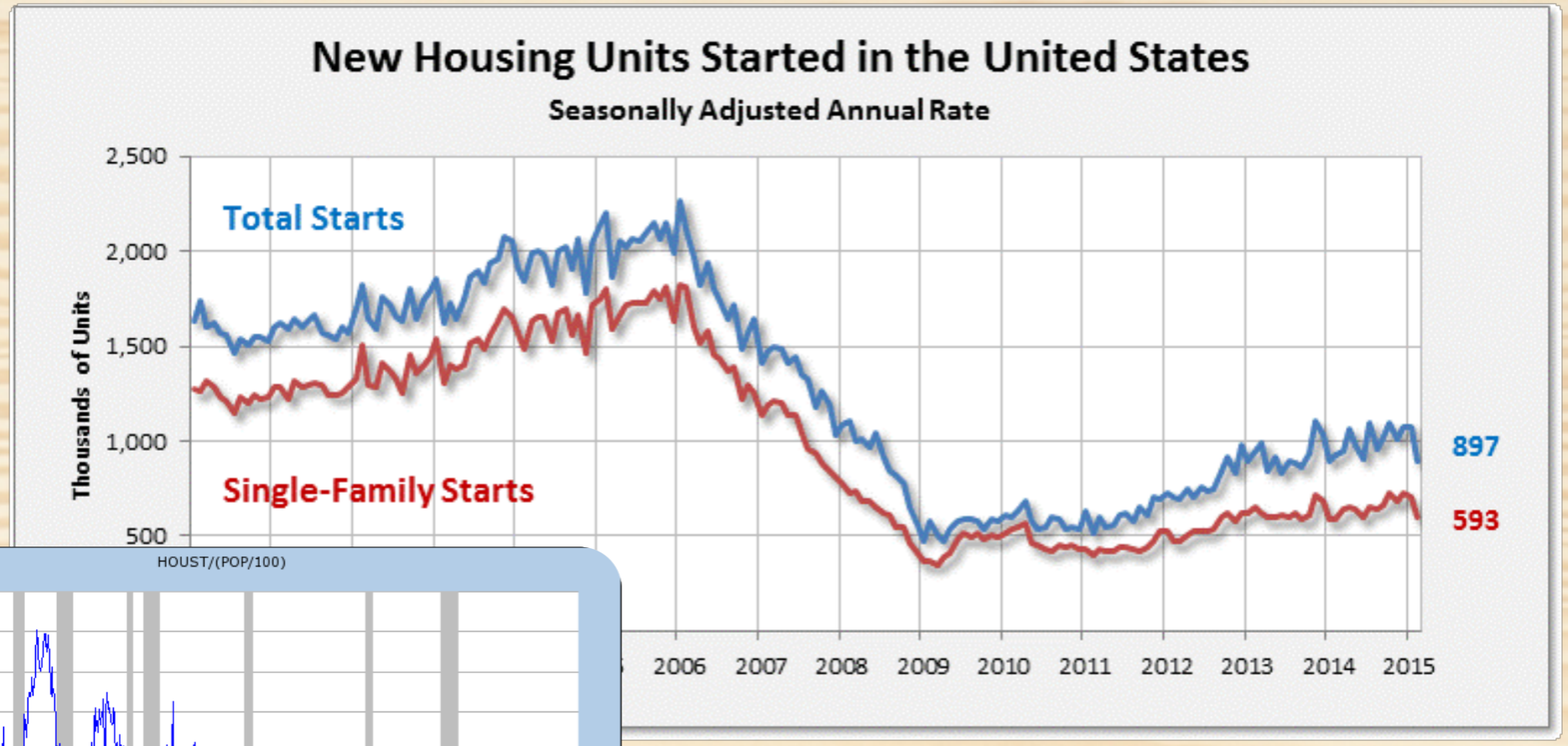
Primary mills

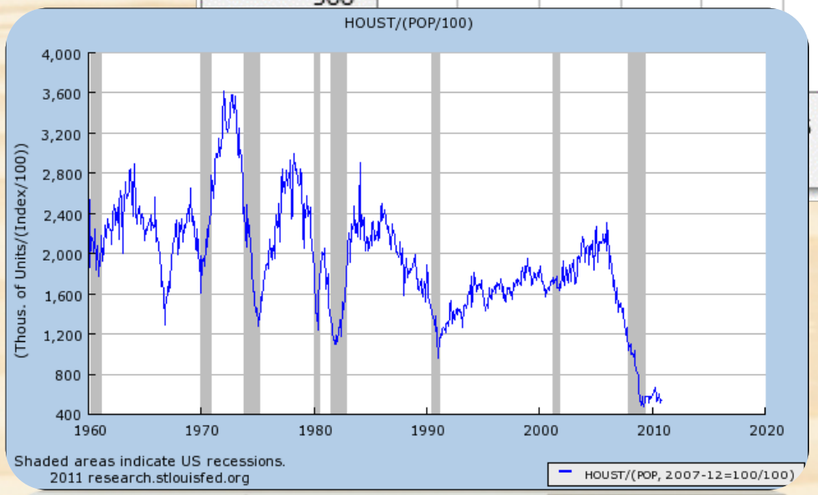
Secondary mills

TIMBER UTILIZATION

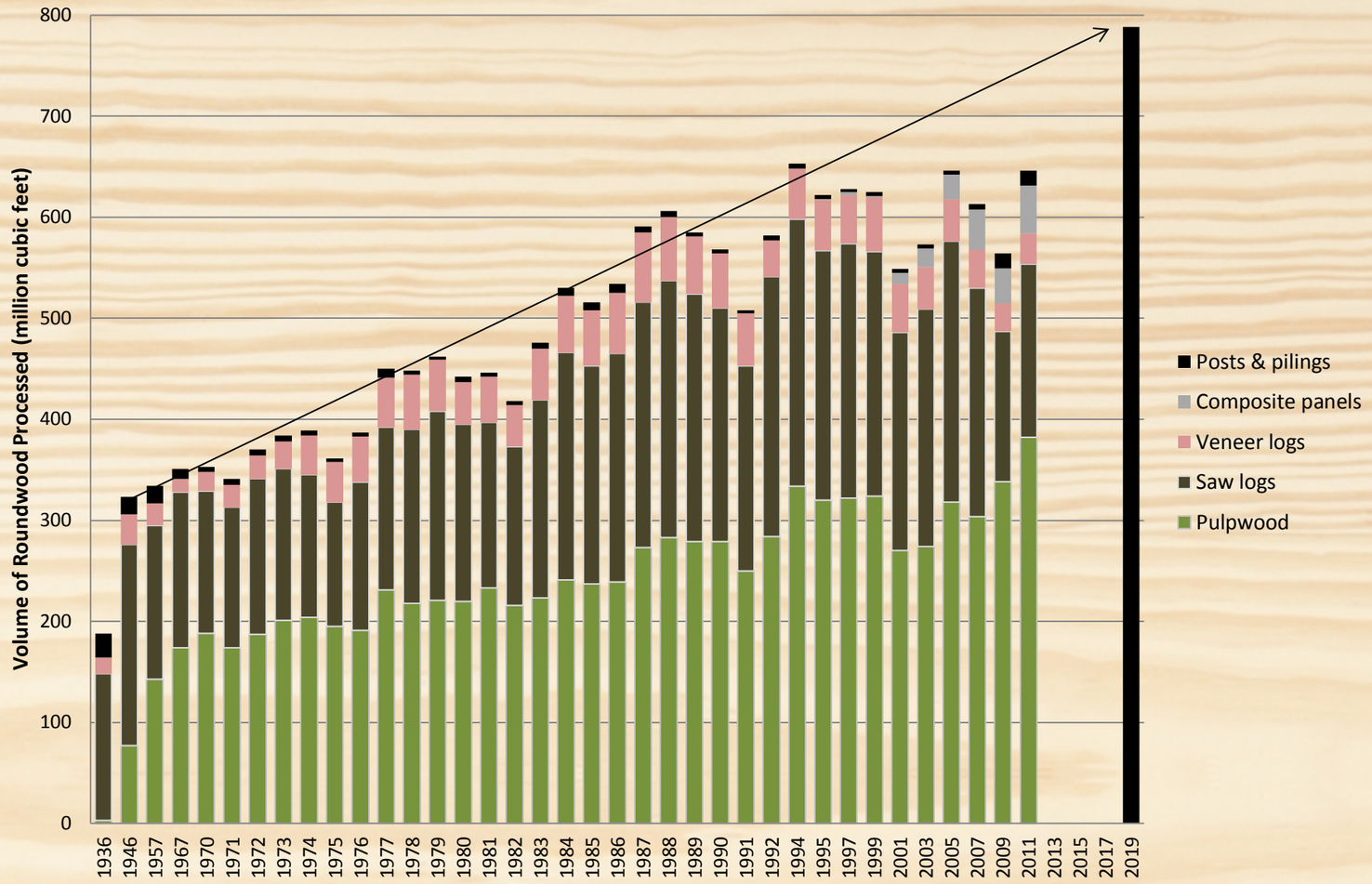


HOUSING STARTS RECOVERING SLOWLY





SC PRODUCTION OF PRIMARY TIMBER PRODUCTS



SC FORESTRY'S ECONOMIC IMPACT

THE 20/15 PROJECT VISION

Grow the forest industry from $17.4 billion to $20 billion in total economic impact by the year 2015

20/15 ACTION ITEMS

- Retain and grow existing businesses and seize new opportunities.
- Fully utilize record timber volumes.
- Conduct needed research and development
- Aggressively market SC forest products and business opportunities.
- Address infrastructure needs.
- Protect forests and business investments.

ECONOMIC RELATIONSHIPS

- $17.4 billion and 90,000 jobs from 23.4 million tons of wood
- One ton = $744 economic impact
- 260 tons = one job
- 10.4 log trucks = one job

HOW TO REACH $20B BY 2015

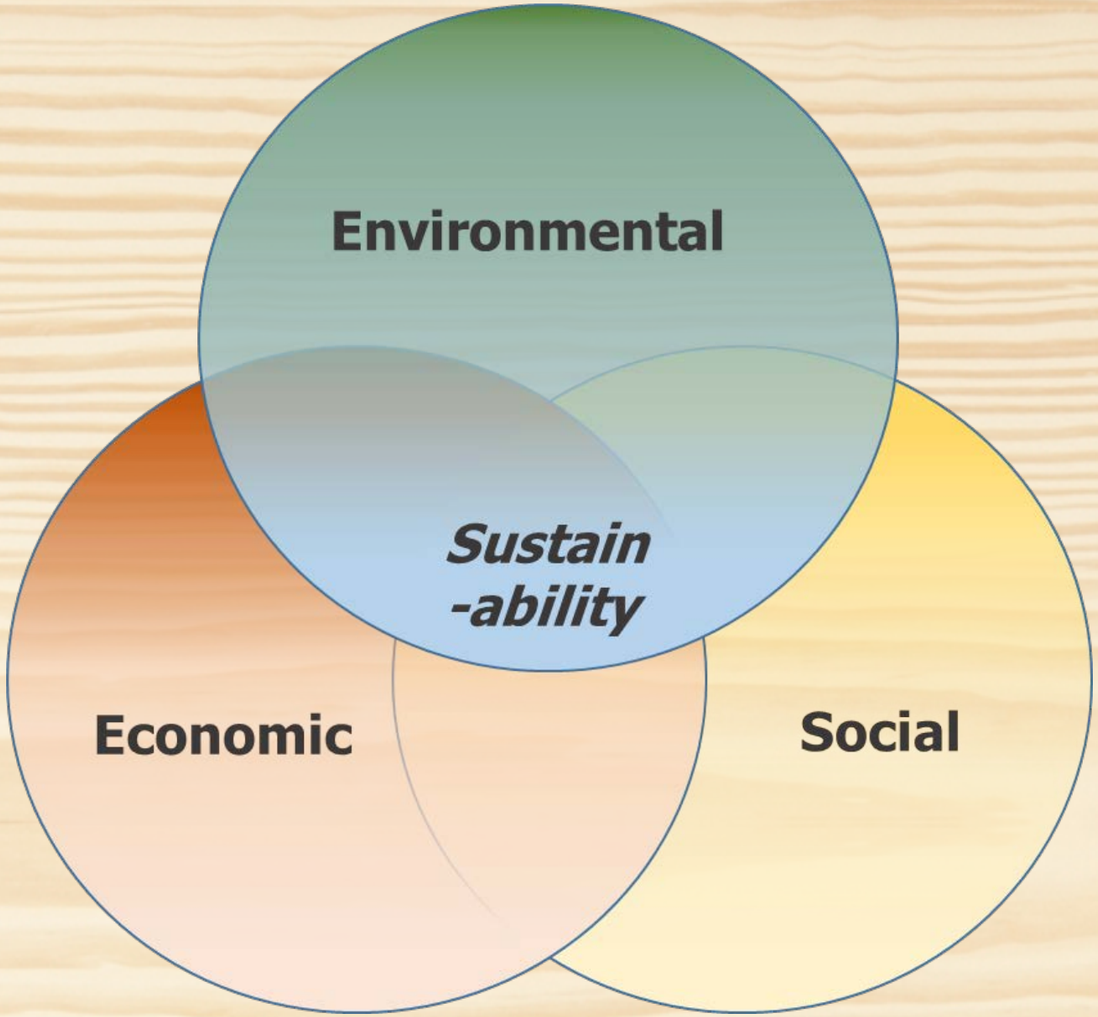
- Increase timber production from 23.4 to 27 million tons
- And/or increase value added from $744 to $855/ton
- 2013 production was up about 9.6% (25.65 million tons)
- 25.65 million tons approximates a $19 billion economic impact
- Current IMPLAN economic impact study will confirm status

THE FOREST INDUSTRY'S EXPANDING

despite declining pulpwood-sized pine timber

- Expand sawmilling
- Retain pulp & paper & OSB manufacturing
- Increase exports
- Increase secondary manufacturing
- Increase active forest management
- Plant more trees
- Public and private effort!

FORESTRY IS AN "IDEAL" INDUSTRY



SC'S FOREST INDUSTRY GROWS, AND SO DO ITS JOBS!

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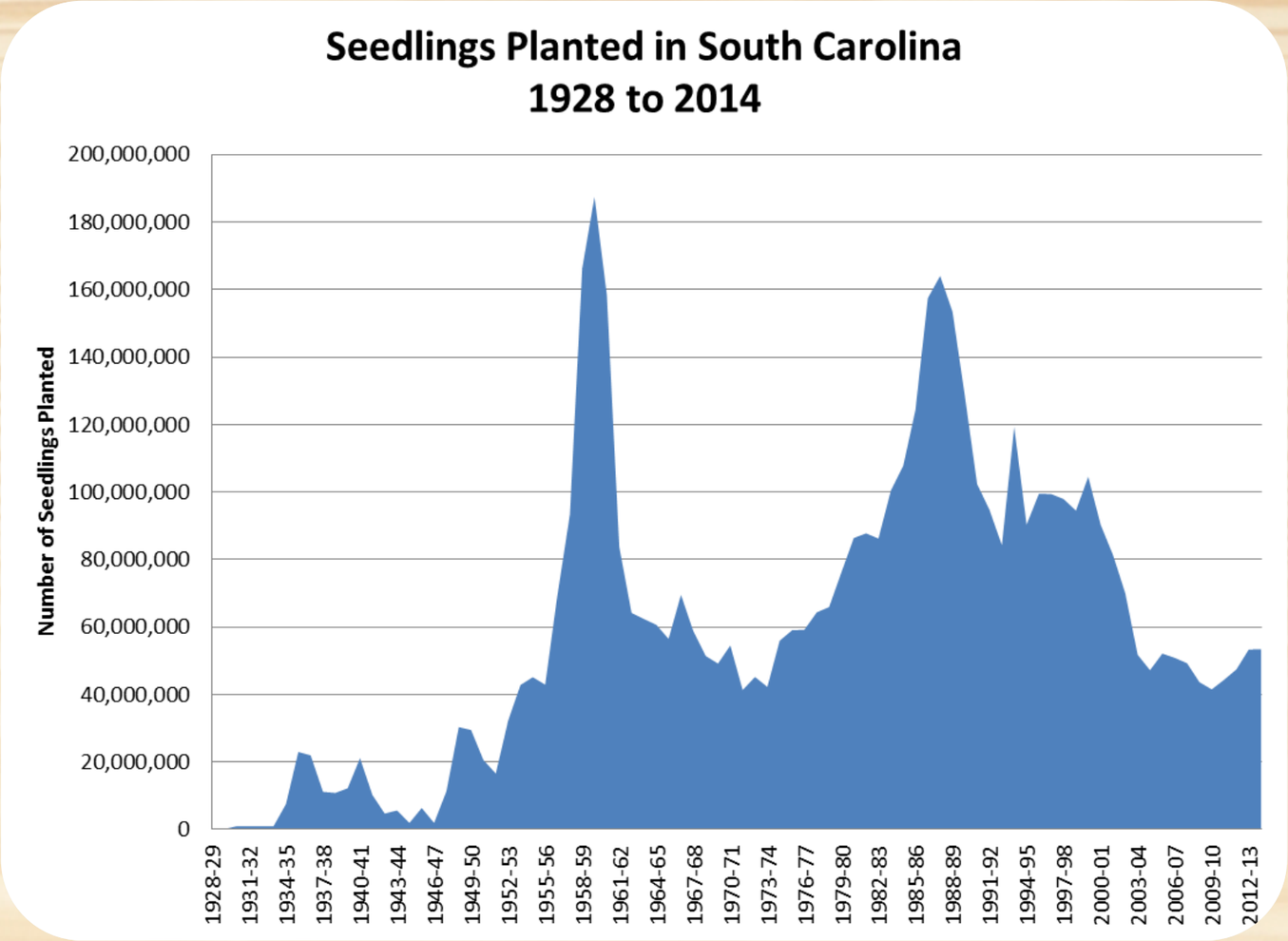
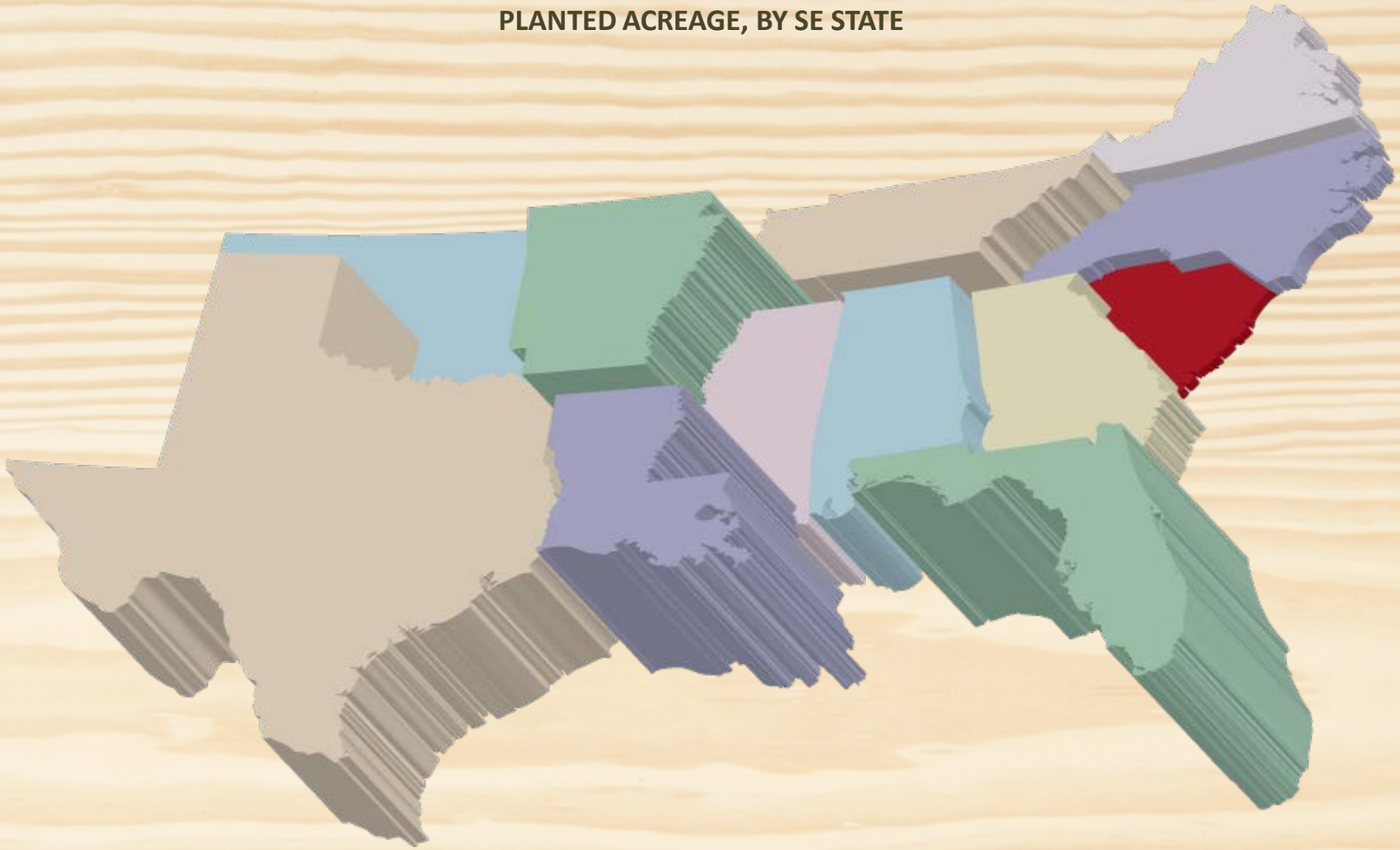
SC AT 40-YEAR LOWS IN TREE PLANTING



SC HAS LOWEST % PLANTED PINE ACREAGE

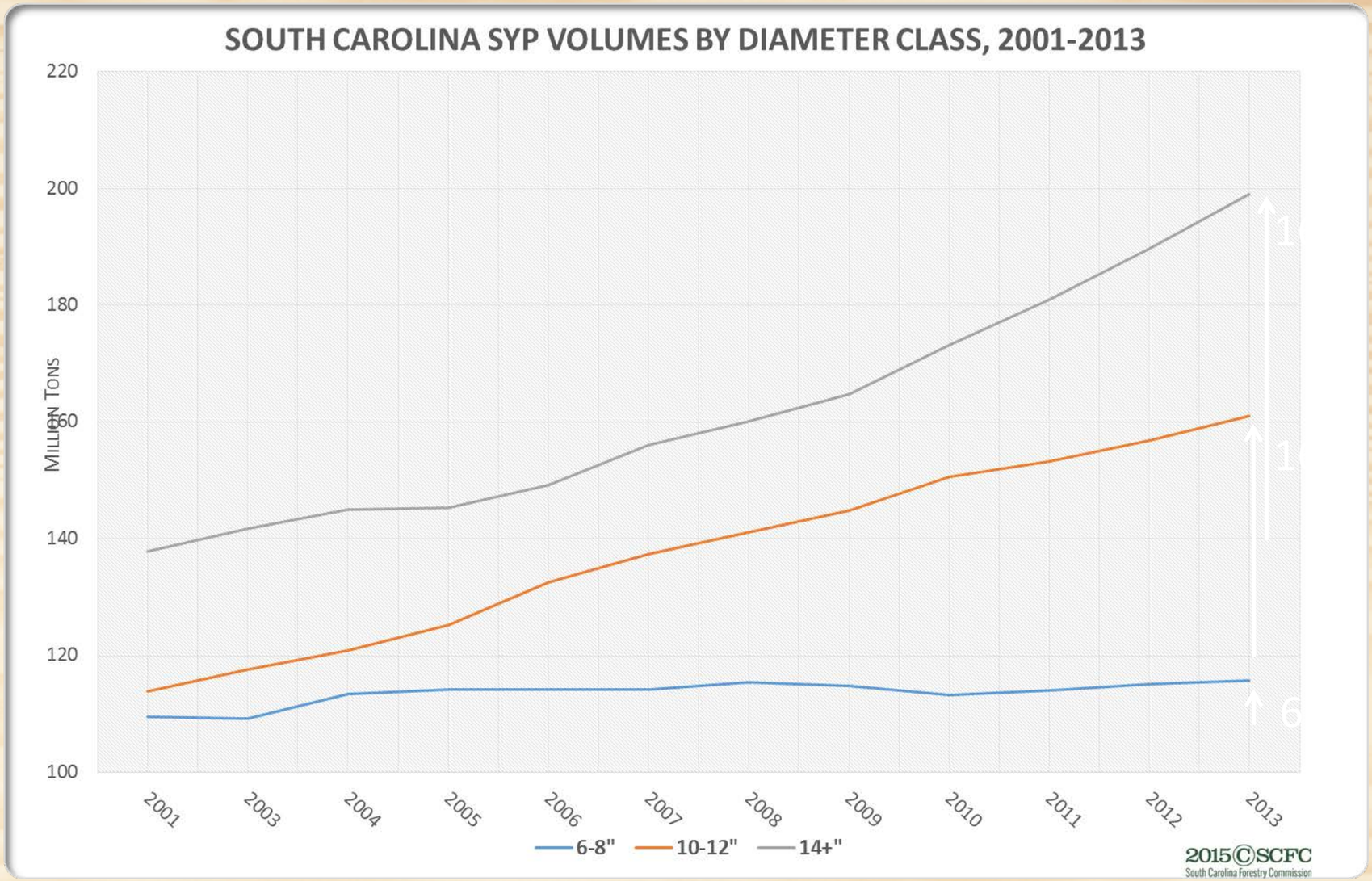
in 0-15 age class in the Southeast

PLANTED ACREAGE, BY SE STATE

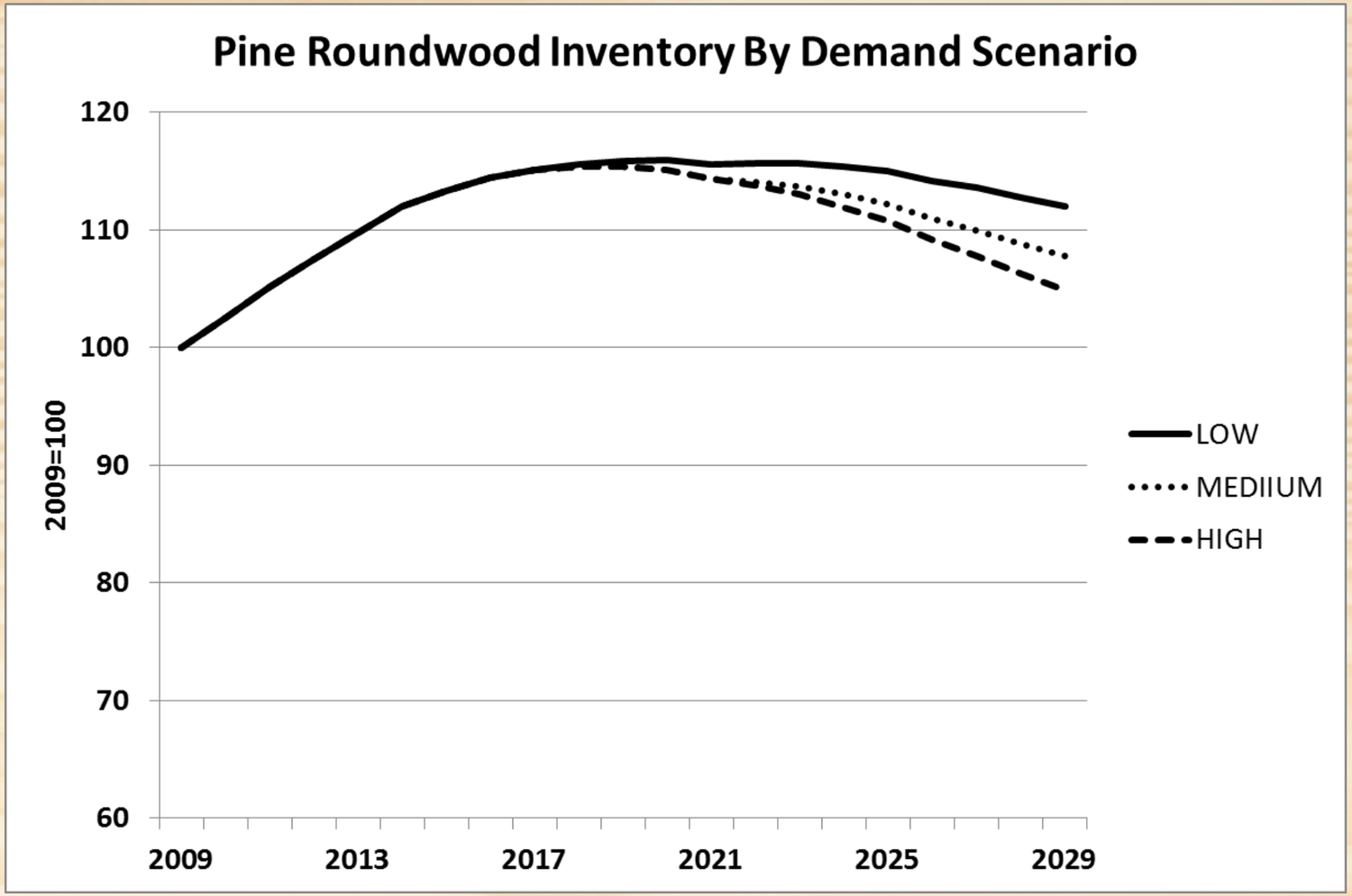


Alabama	54.1%
Florida	54.0%
Louisiana	52.9%
Texas	52.5%
Tennessee	50.3%
Alabama	49.9%
Mississippi	46.2%
Oklahoma	44.4%
Georgia	40.7%
Virginia	38.7%
N. Carolina	37.2%
S. Carolina	**30.2%**

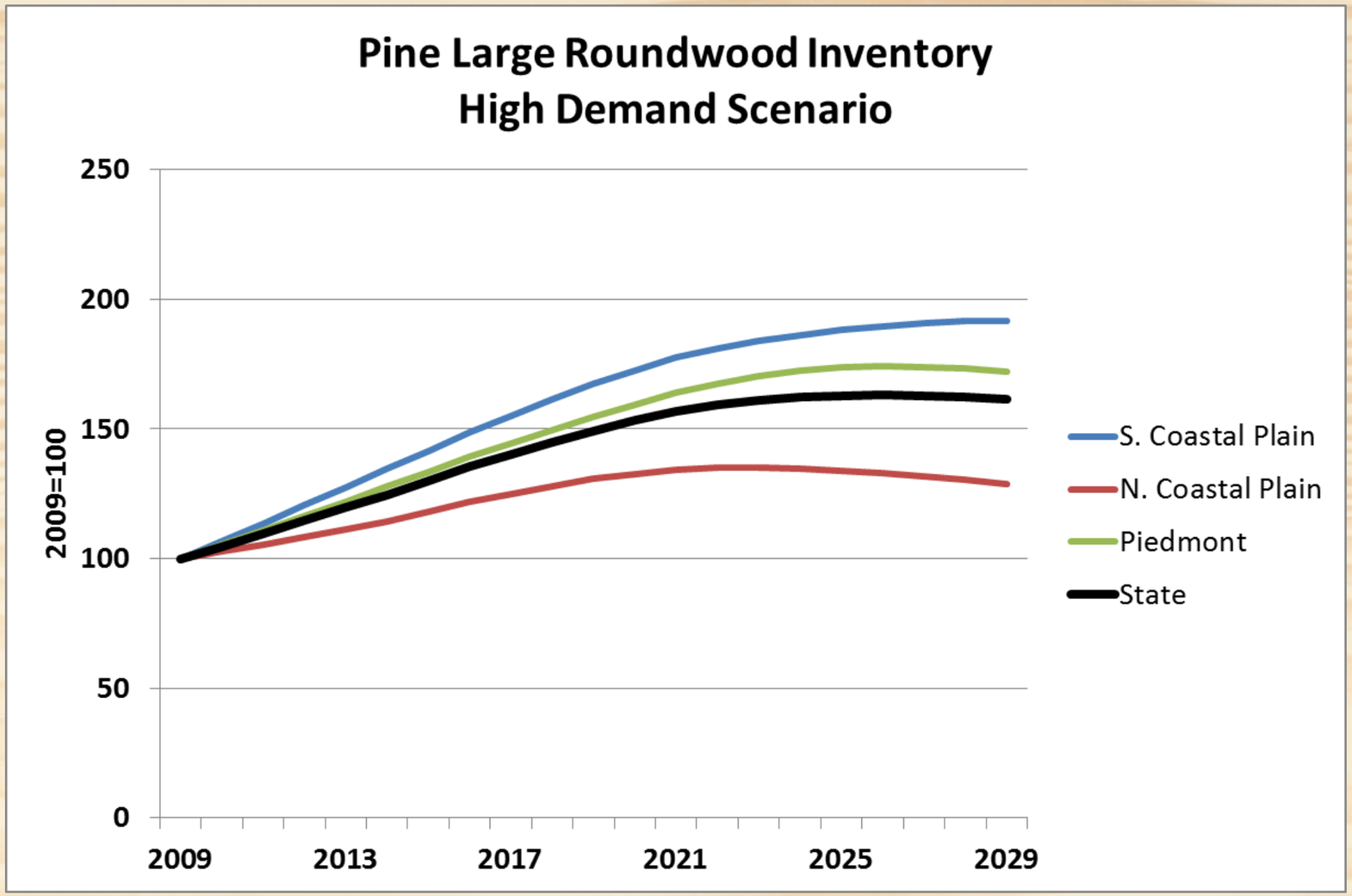
SYP VOLUMES UP STATEWIDE



TOTAL WOOD INVENTORY WILL CONTINUE TO GROW



SUPPLY OF LARGE-DIAMETER PINES TO GROW



SUPPLY OF SMALL-DIAMETER PINES TO PEAK SOON