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The Georgia Forestry Association (GFA) is the leading advocate for a healthy business and political climate for Georgia's forest environment, forest landowners and forest-based businesses. Learn more at www.gfagrow.org.

GEORGIA'S WORKING FORESTS:

DELIVERING VALUE TO EVERY GEORGIAN

FORESTS. THEY MAKE LIFE BETTER.



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“Forestry needs champions in the public policy arena who understand the value of our forests and who are not willing to stand by and allow conditions to persist that place its numerous benefits at risk.”

WADE HALL, PRESIDENT, STUCKEY TIMBERLANDS

HOW DO GEORGIANS VIEW THE WORKING FORESTS THAT SURROUND THEM?

Like many Americans, Georgians tend to take their state’s forests for granted. Forestlands are often considered natural gifts, such as the sun and the clouds – beautiful sights that are timeless and steadfast. But Georgia’s forests have not been here forever and they don’t take care of themselves.

So who tends the trees? Most Georgia forests are privately owned by ordinary citizens who provide truly extraordinary services. These stewards of the forest use their own resources to manage healthy forestland that benefits every Georgian. Their forests provide air to breathe, water to drink, beauty and recreation to enjoy – along with billions of dollars in economic impact to Georgia. These are Georgia’s *working* forests.

Working forests are the result of healthy markets in Georgia. Strong timber markets mean strong revenue, and strong revenue provides a strong incentive for forest landowners to continue to invest in sustainable management to keep their land in forestry.

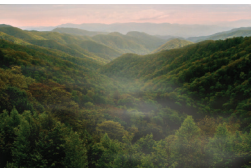
WHY IS IT IMPORTANT TO UNDERSTAND THE VALUE OF OUR PRIVATE WORKING FORESTS?

Ninety percent of Georgia's forests, which cover two-thirds of the land area of the state, are privately owned. Much of that land is owned by tens of thousands of private, non-industrial landowners whose stewardship serves to clean our water and air while providing valuable wildlife habitat and outdoor recreation (GFC 2014). It is not an overstatement to say that Georgia's economy depends in some large measure on the well-being of its forests.

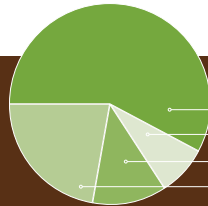
Georgia's private forest landowners must have sufficient economic incentive to harvest and sell trees if they are going to actively manage this precious natural resource that provides so much benefit to Georgians. Those forest landowners and forest

industries face pressure today from growing global competition, local property taxes not reflective of the actual use of the land, and sprawling urban and suburban development.

Without a better understanding of the economic and environmental underpinning that forests provide to our state, Georgia's public, private and non-governmental organization leaders are more likely to make policy decisions that do not support landowners keeping their land in forests. At the heart of this understanding must be a clear picture of the complete value of the forests.



OWNERSHIP
OF GEORGIA
TIMBERLAND
(24.3 MILLION ACRES)



55% PRIVATE, INDIVIDUAL
10% PUBLIC
8% FOREST INDUSTRY
27% CORPORATE



“Open space and its supporting habitat is being lost at a rate of nearly 2,000 acres per day in the United States. Not only a pervasive problem, with roots in numerous subsequent and environmental social issues, the loss of open space actually depletes our capacity to deal with other environmental problems and diminishes opportunities for discovering new solutions.”

THE VALUE OF CONSERVATION EASEMENTS: THE IMPORTANCE OF PROTECTING NATURE AND OPEN SPACE, WEST HILL FOUNDATION FOR NATURE, DECEMBER 1, 2002



ECOSYSTEM SERVICES AND ECOLOGICAL FUNCTIONS OF GEORGIA'S FORESTS **\$ 37.6 BILLION** DELIVERS VALUE TO 9 MILLION CITIZENS

WORKING FORESTS MAKE GEORGIA'S ECOSYSTEM BETTER.

The impact of the forest products industry on Georgia's economy is tremendous. Products derived from forests are used in thousands of common consumer items that improve our health and everyday lives. But beyond recreation and wood and fiber product manufacturing, what value do Georgia's working forests provide in water filtration, carbon storage, wildlife habitat, and scenic beauty?

A University of Georgia study completed in January 2011 conservatively estimates the value of the ecosystem services of Georgia's 22 million acres of privately owned forestland at more than \$37.6 billion per year.

The value of ecosystem services is difficult to quantify. The benefits of scenic beauty and habitat for endangered species, for example, are not easily captured. But beyond timber and forest products and recreation, the things nature provides that are of direct benefit to humans include:

- // greenhouse gas and climate regulation,
- // water supply and quality,
- // soil formation and stability,
- // pollination,
- // habitat refuge, and
- // aesthetic and cultural values.

Why is this value – viewed together with the impact of forest recreation and the forest products industry – important? Decisions are being made today that will significantly impact the amount of land that remains in forest cover in the future. Wise land use decisions must take into account the total economic value of each land use option, including the value of ecosystem services (Moore et al., 2011).

When the total economic value of forested land – including the value associated with timber production *and* the ecosystem services provided – is compared to the total economic value of alternative land uses, more land is likely to remain in forest production, ensuring that forests provide Georgians with economic opportunity, revenue for government services and the benefits of ecosystem services.

If we want landowners to keep their land in forests – providing ecosystem services to benefit Georgians and maintaining the state's competitiveness in domestic and global forest product markets – then we need public policy that does not drive these landowners toward non-forest land use options such as development. Forest conversion for development (houses, commercial, and industrial uses) continues to be the greatest "loss" of Georgia's forests.

WORKING FORESTS MAKE GEORGIA'S ECONOMY BETTER.

For more than a century, Georgia's working forests have provided opportunity in new markets for trees, turning Georgia's most plentiful, renewable, natural resource – trees – into jobs and tax dollars, cleaning Georgia's air and water in the process.

Today, Georgia's forest product manufacturers annually inject \$28.9 billion into the state's economy.

Georgia's 22 million acres of private timberland available for commercial use – more than any other state in the nation – employs 135,732 Georgians in 179 wood product manufacturing facilities, 1,200 secondary manufacturers, nearly 1,000 logging contractors and another 200 vendors in the state's second largest industry.

The manufacturing and manufacturing-related technical and research jobs are among the most sophisticated and highly

compensated in the state. Thousands of Georgians are employed at trucking companies, railroads, the port and wholesalers and retailers whose roles are vital for moving Georgia's wood and fiber to market.

In fact, the top two export commodities from the Georgia Ports Authority's ports in Savannah and Brunswick are wood pulp and paper/paperboard, significantly outpacing the next largest export commodities – food, clay and chemicals *combined!*

Georgia's forestry industry generates an estimated \$604 million per year in revenues for the state budget, including individual and corporate income taxes, sales and use taxes, highway taxes, fees, and miscellaneous revenues – supporting education, public health, safety and welfare, highways, administration and more (Enterprise Innovation Institute, 2013).



GEORGIA'S WOOD AND FIBER PRODUCT MANUFACTURING **\$28.9 BILLION** DELIVERS ECONOMIC BENEFIT





TREES FROM
GEORGIA'S WORKING
FORESTS

ARE USED IN

OVER 5,000

COMMON CONSUMER ITEMS

WORKING FORESTS MAKE LIFE BETTER FOR ALL GEORGIANS.

Over several generations, the forestry industry has turned trees into turpentine then lumber, poles, posts, panels, pulp, paper and specialty chemicals. Today, trees from Georgia's forests are used in thousands of common consumer items that play a vital part in improving your health and your everyday life.

Scientists studied the structure of trees and discovered that all parts of a tree, big or small, have an abundance of valuable chemicals. In fact, wood and other organic materials – such as small diameter trees from thinnings, logging residues, sawdust and other by-products of wood manufacturing facilities and land clearing debris – can be collected to produce renewable bioenergy.

Wood and derivatives from wood, such as wood pulp, cellulose and rayon, are used in several common consumer items including (GFC, 2014):

- // Fruits & Nuts
- // Baseball bats
- // Candles
- // Clothing
- // Cough syrup
- // Crayons
- // Eyeglass frames
- // Football helmets
- // Gum
- // Lipstick
- // Lumber & Plywood
- // Make-up
- // Maple syrup
- // Milk cartons
- // Nail polish
- // Newspaper
- // Paint
- // Parmesan cheese
- // Pencils
- // Perfume
- // Shampoo
- // Smartphone and TV screens
- // Sponges
- // Tires
- // Toilet tissue
- // Toothpaste

WORKING FORESTS MAKE GEORGIA'S RECREATION BETTER.

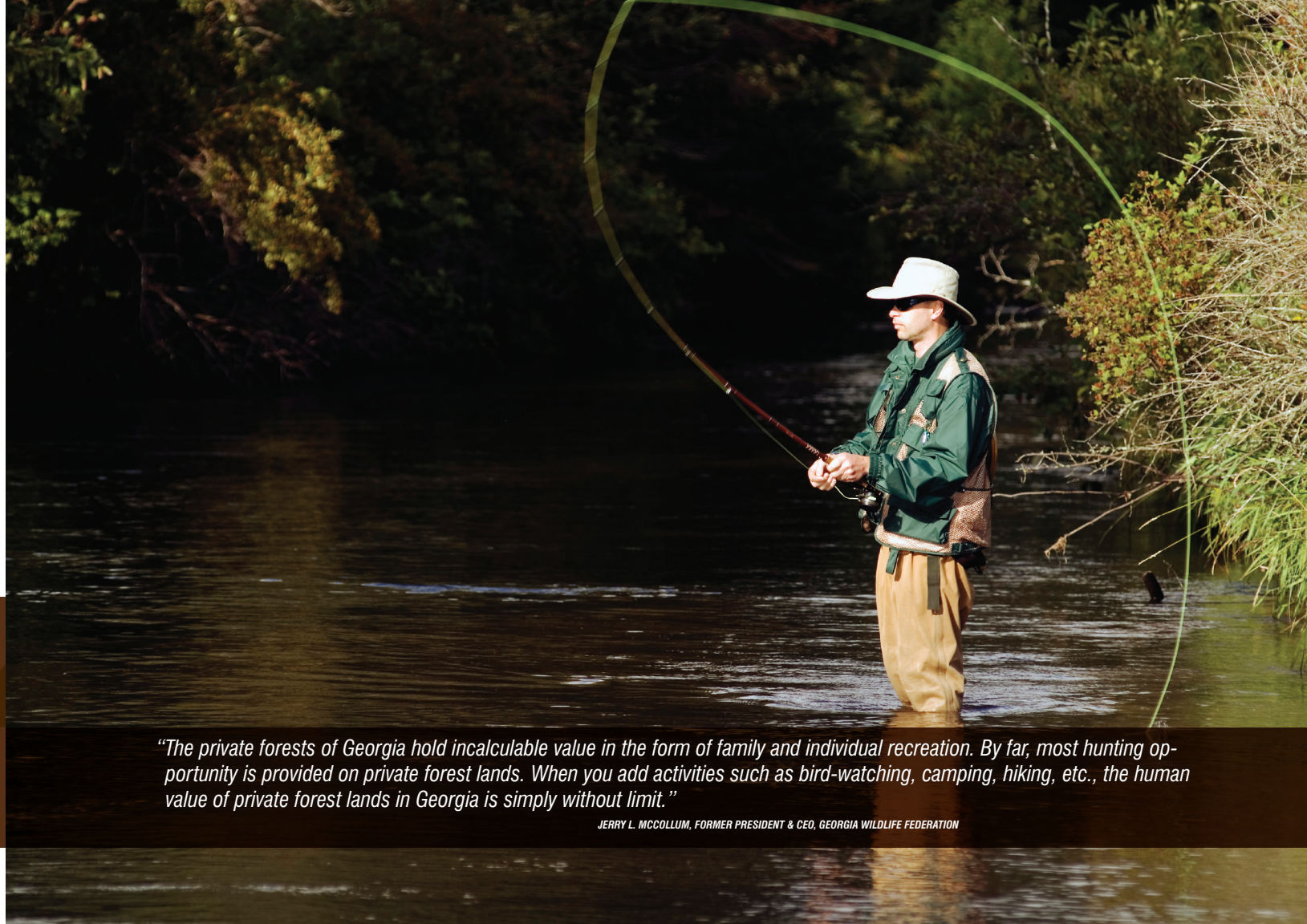
Privately owned working forests provide vast opportunity for recreation to the great benefit of Georgians and visitors to the state. Forests are important to hunters, anglers, birdwatchers, hikers, nature photographers, horseback riders, campers and others. The work by landowners to manage these forests includes, of course, water as a high priority, providing additional recreational opportunity. Without the state's abundance of working forests, Georgia would not be one of the leading sportsman's destinations in the country.

More than 3 million people participate annually in wildlife-related recreation in the state of Georgia, generating \$4.6 billion for the economy.



FOREST-RELATED
OUTDOOR
RECREATION IN
GEORGIA **\$ 4.6 BILLION**
IN ECONOMIC BENEFIT

DELIVERS



"The private forests of Georgia hold incalculable value in the form of family and individual recreation. By far, most hunting opportunity is provided on private forest lands. When you add activities such as bird-watching, camping, hiking, etc., the human value of private forest lands in Georgia is simply without limit."

JERRY L. MCCOLLUM, FORMER PRESIDENT & CEO, GEORGIA WILDLIFE FEDERATION



GROW
19 MILLION TONS
MORE WOOD THAN IS HARVESTED ANNUALLY

GEORGIA'S
WORKING
FORESTS

GEORGIA'S FOREST LANDOWNERS ARE COMMITTED TO SUSTAINABILITY.

Georgia's forests are being sustainably managed to meet the growing needs of Georgians today and in the future.

Georgia's forested area has remained stable over the past 50 years at about 24 million acres. Approximately 90 percent of this acreage is privately owned, and Georgia has more privately-owned timberland than any other state.

As result of healthy markets for timber from private forest landowners, Georgia's working forests grow 19 million tons more wood each year than is harvested. Therefore growth of timber exceeds removals by 38 percent annually (GFC, 2014).

Georgia's forestlands provide immense value to citizens, and the sustainable management of the state's forests is a significant factor in ensuring that these benefits - such as water quality and supply - continue for future generations.

Many of the state's 44,056 miles of perennial streams and 23,906 miles of intermittent streams begin or flow through forestlands

providing a vital filtration system for the 134 supply reservoirs that provide many Georgians with a clean source of water.

State Forestry Best Management Practices (BMPs), tailored to the specific conditions and needs in various regions of the state, address activities such as harvesting, planting and roadways and the effect of these practices on water quality.

In 2013, according to the Georgia Forestry Commission, 209 sites totaling 27,500 acres of separate forestry operations were evaluated. BMPs were found to be implemented at a rate of approximately 89.9 percent (GFC, 2014).

The continued use of best management practices for timber harvesting means that Georgia's forests will remain sustainable for present and future generations, providing tangible benefits to landowners, local economies and forest industries, while continuing to provide vital ecosystem services from which all Georgians benefit.