



**GEORGIA
FORESTRY
ASSOCIATION**



The #1 Forestry State in the Nation

Assessing the Economic and Environmental Benefits of Georgia's Working Forests and Forest Product Industries.

UPDATED FEBRUARY 2022

Executive Summary

Forestry is inextricably tied to the heritage and fabric of Georgia, serving as the economic backbone of the state while providing countless environmental and social benefits to all citizens. Thanks to the advances in the scientific process of modern forest management, stewardship of private forest landowners and innovations in the manufacturing supply chain, Georgia has solidified its position as a domestic and global leader in forest product manufacturing and forest conservation.

For the 6th year in a row, Georgia has been named the #1 State for Business due to the state's skilled labor force, favorable regulatory environment and advanced infrastructure. Those factors have without a doubt lead to a strong business climate for forestry. When considering the state's ability to efficiently and sustainably manage forestland at-scale while converting raw material to more than 5,000 different products, Georgia is the **#1 Forestry State in the Nation**.

GEORGIA FORESTRY AT A GLANCE

#1 IN PRIVATELY-OWNED TIMBERLAND

with 22 million acres of commercially-available timber.¹

#1 IN ANNUAL HARVEST VOLUME

while growth exceeds removals by 48%.²

#1 EXPORTER OF FOREST PRODUCTS

leading the nation in the export of 21 commodities with an estimated trade value of \$3.9 billion.³

#1 IN WOOD HARVESTED FOR PINE PRODUCTION & PINE PULPWOOD PRODUCTION IN THE U.S. SOUTH⁴

#1 IN SEEDLING PRODUCTION FOR REFORESTATION⁵

\$39.1 BILLION

Overall annual economic impact⁶

\$928 MILLION

State tax revenue

140,081

Direct and indirect jobs

83 COUNTIES

Have at least one primary wood using mill²

48% GROWTH OVER REMOVALS

Forest stock has been increasing since 1953.





Overview of Georgia's Forests

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*.

FIG. A
**GEORGIA
FORESTLAND
OWNERSHIP²**
24 Million Acres

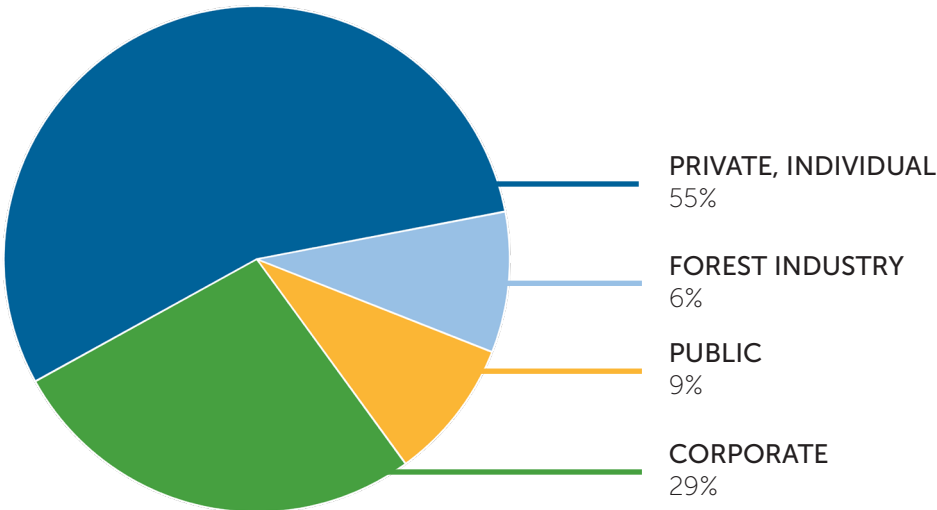
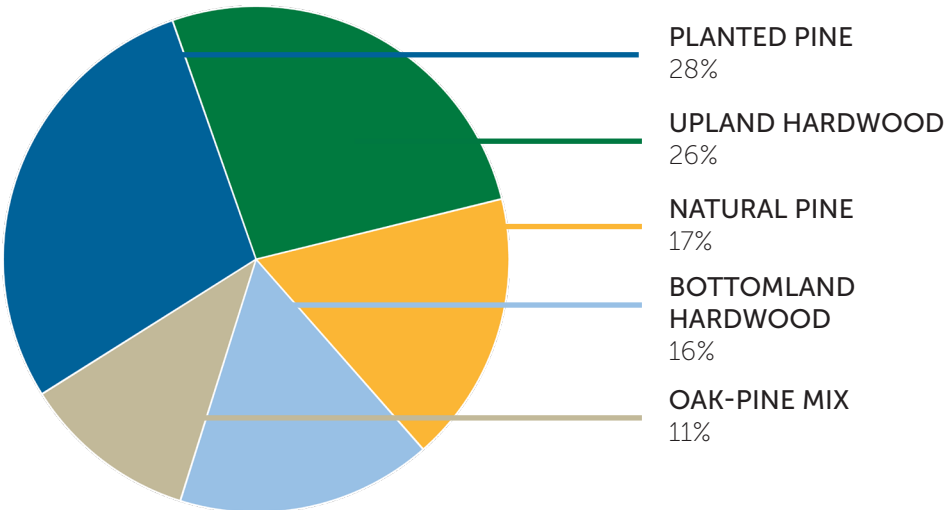


FIG. B
**GEORGIA
FOREST TYPES
BY GROUP²**



Forest Product Manufacturing

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 more than 5,000 common consumer items that play a vital part in improving your health and your everyday life.

FIG. C

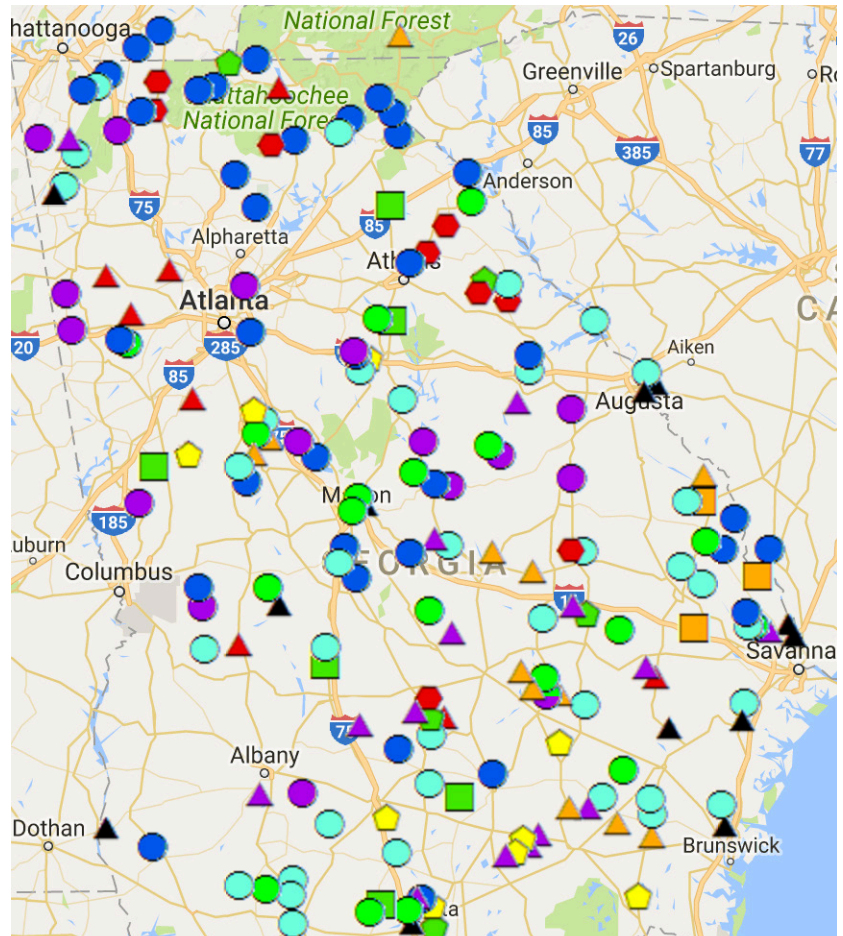
GEORGIA FOREST PRODUCT MANUFACTURING⁷

▲ PULP AND PAPER
12 MILLS

● SAWMILLS
(HARDWOOD, SOFTWOOD & BOTH)
95 MILLS

● CHIP MILLS
23 MILLS

TOTAL NUMBER OF
WOOD-USING FACILITIES
206 MILLS



Sustainability

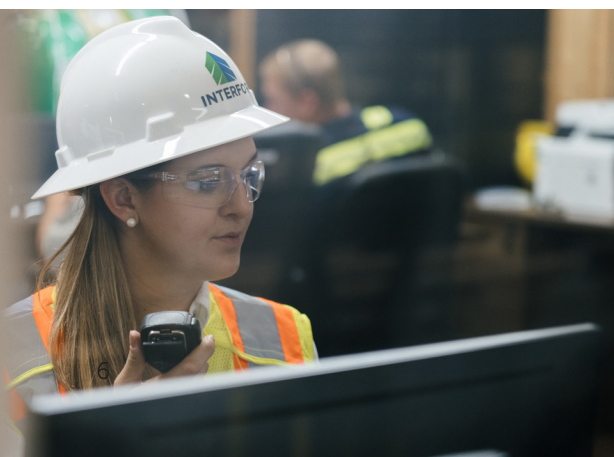
Working forests represent one of the largest at-scale solutions to some of our state's greatest challenges, such as CO₂ sequestration, water quality and quantity and alternative, sustainable products. Critical to the future of these benefits is the state's ability to sustainably manage forests.

- **48% Growth Over Removals**
More wood is growing than is being harvested on an annual basis, and forest stock has been increasing in volume since 1953.²
- **+1,500 Trained Loggers**
Approximately 1,500 loggers and timber processors are trained through the Sustainable Forestry Initiative's logger education programs, such as the Master Timber Harvester Program, to adhere to Georgia's Best Management Practices for Water.
- **Forest Certification Programs**
The American Tree Farm System (ATFS), the Forest Stewardship Council (FSC), and the Sustainable Forestry Initiative (SFI) are examples of forest certification programs that can make positive contributions to our nation's public and private forests.

Economic Contributions

Working forests serve as the backbone of Georgia's economy. The forest industry employs hundreds of thousands of 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 export commodities from the Georgia Ports Authority's ports in Savannah and Brunswick include wood pulp, wood pellets and paper/paperboard, significantly outpacing the next largest export commodities – clay and automotive combined!⁷



ECONOMIC HIGHLIGHTS

\$39.1 BILLION

Overall annual economic impact⁶

\$928 MILLION

State tax revenue

140,081

Direct and indirect jobs (55,562 direct jobs)⁶

\$9.1 BILLION

Wages and salaries earned by forest industry employees.

12 PULP & PAPER MILLS

Represented 61% of direct revenue output, 36% of employment, and 44% of compensation.

\$5.5 BILLION

Economic output by 3.6 million people who participate in forest-related outdoor recreation²

83 COUNTIES

Have at least one primary wood-using mill.

47 COUNTIES

Ranked as critically dependent on the forest industry for their economic wellbeing.⁹

Environmental Contributions

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 to our environment?

Georgia's private forest landowners serve as stewards of 92% of our state's forests. Through their management of these forests, they lead a massive reforestation effort while providing the greatest at-scale solution for clean and abundant water, carbon sequestration and wildlife habitat.

ENVIRONMENT HIGHLIGHTS

21 TREES PER GEORGIA RESIDENT

Planted annually by private forest landowners.

17 BILLION CUBIC METERS OF AVOIDED WATER RUNOFF

65% of Georgia watersheds flow through working forests.²

18 MILLION TONS OF CARBON ABSORBED ANNUALLY

Wood is 50% carbon by dry weight.¹⁰

26% LESS NET CO₂ EMISSIONS

Wood framing in a home produces 26 percent less net CO₂ emissions than steel and 31 percent less than concrete.¹²

#6 IN BIODIVERSITY

Georgia ranks 6th in the United States for overall biological diversity.²

48% GROWTH OVER REMOVALS

More wood than is being harvested on an annual basis, and forest stock has been increasing in volume since 1953.²





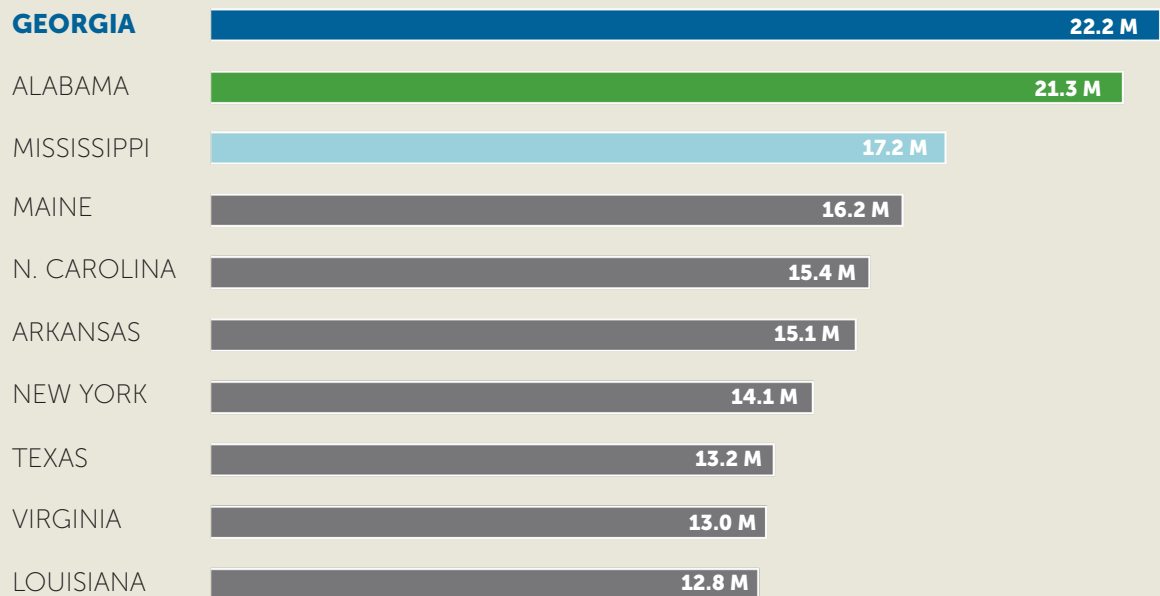
Lynda Beam
Too Holly Tree Farm | Oliver, Georgia

#1 in Privately-Owned Timberland

Georgia leads the nation in privately-owned timberland at 22 million acres. In addition to providing great economic and environmental benefits to the state, these working forests, and the landowners who steward them, serve as a strong pillar of the forest industry in Georgia, providing a sustainable source of raw material while contributing to the health and prosperity of local communities.

FIG. D | Privately-Owned Timberland¹

Top 10 in the U.S. by acres privately-owned (in millions)



#1 in Annual Harvest Volume

In addition to a sustainable source of raw material, Georgia's more than 1,500 logging companies collectively harvest more timber by volume than any other state in the nation.

In addition, Georgia ranks second in net forest growth by volume with growth exceeding harvests by 48%.

FIG. E | Annual Harvests and Net Growth¹

Top 10 in the U.S. by volume of wood harvested (in thousands of cubic feet)

	Wood Harvested	Net Growth
GEORGIA	1,191,108	1,783,131
ALABAMA	915,712	1,599,006
OREGON	881,253	1,728,514
N. CAROLINA	817,104	1,518,282
MISSISSIPPI	747,590	1,783,849
WASHINGTON	717,283	1,602,371
LOUISIANA	711,838	965,277
S. CAROLINA	708,355	1,157,784
ARKANSAS	624,157	1,194,042
VIRGINIA	622,648	972,770

#1 in Forest Product Exports

Georgia's Ports in Savannah and Brunswick rank among the most productive in North America, providing forest products with unparalleled access to global markets. The state's strong forest products sector has taken advantage of this infrastructure, and it leads the nation in the value of forest product exports.

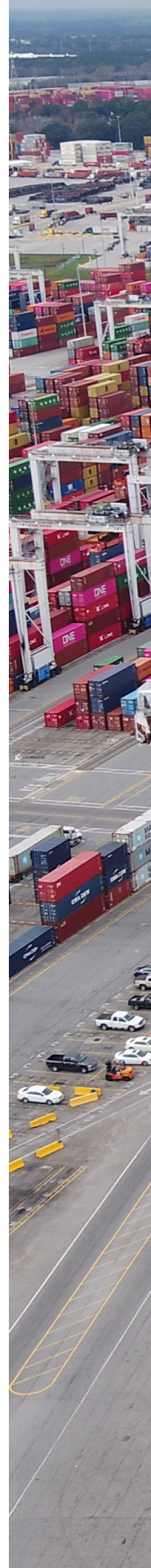
Georgia is the top exporter of pulp, paper and paperboard mill products, accounting for 14.9% of the nation's total exports in that category. In addition, when analyzing trade value across all forest product exports, the state leads the nation in 21 categories and is among the top exporters in several additional categories. Therefore, it is no surprise that Georgia is ranked as the top exporter of forest products by trade value.

FIG. F | Forest Product Exports³

Top 10 in the U.S. by State Exports and Trade Value

	Total Value (\$US)	% of U.S. Total
GEORGIA	\$3,997,044,230	11.1%
CALIFORNIA	\$2,713,966,200	7.5%
TEXAS	\$2,264,822,068	6.3%
WASHINGTON	\$2,119,199,068	5.9%
NEW YORK	\$1,963,742,363	5.4%
FLORIDA	\$1,911,396,643	5.2%
N. CAROLINA	\$1,426,406,831	3.9%
ALABAMA	\$1,345,655,674	3.7%
WISCONSIN	\$1,313,677,116	3.6%
TENNESSEE	\$1,236,447,331	3.4%
U.S. TOTAL	\$36,132,437,430	

Source: US Census Bureau: Economic Indicators Division- USA Trade Online
State Exports by HS Commodities. Chart includes combined forest product export commodities, including: 44 Wood And Articles Of Wood; Wood Charcoal; 45 Cork And Articles Of Cork; 46 Mfr Of Straw, Esparto Etc.; Basketware & Wickerwrk; 47 Wood Pulp Etc; Recovd (waste & Scrap) ppr & pprbd; 48 Paper & Paperboard & Articles (inc Papr Pulp Artl); 49 Printed Books, Newspapers Etc; Manuscripts Etc.







#1 in Wood Harvested for Solid Pine Products in the U.S. South

FIG. G | Pine Grade Demand³

Top 10 in the U.S. South by State (Source: Q2 2018 Forisk Research Quarterly)

	Demand (MM Tons)	% Lumber	% Plywood	% Pole	% Export
GEORGIA	15.7	82%	6%	5%	6%
ALABAMA	12.9	89%	9%	1%	1%
MISSISSIPPI	12.6	84%	15%	1%	0%
ARKANSAS	12.4	91%	9%	0%	0%
N. CAROLINA	10.2	89%	7%	0%	4%
S. CAROLINA	8.3	87%	8%	0%	4%
TEXAS	7.6	86%	12%	2%	0%
LOUISIANA	7.6	65%	33%	2%	0%
FLORIDA	7.4	84%	5%	8%	3%
VIRGINIA	3.9	87%	11%	0%	2%



#1 in Wood Harvested for Pine Pulpwood Production in the U.S. South

FIG. H | Pine Pulpwood Demand³

Top 10 in the U.S. South by State (Source: Q2 2018 Forisk Research Quarterly)

	Demand (MM Tons)	% Pulp/Paper	% OSB/Panel	% Bioenergy
GEORGIA	23.6	80%	15%	5%
LOUISIANA	17.3	77%	14%	9%
ALABAMA	16.5	82%	18%	0%
S. CAROLINA	13.1	75%	20%	5%
FLORIDA	11.7	85%	8%	8%
MISSISSIPPI	11.1	85%	8%	7%
N. CAROLINA	10.4	79%	15%	6%
TEXAS	8.4	49%	47%	4%
ARKANSAS	7.5	74%	16%	10%
VIRGINIA	6.8	77%	12%	11%



#1 in Seedling Production

FIG. I | Bareroot and Container Tree Seedling Production⁵

Top 10 in the U.S. by state during the 2017-2018 planting year

	Bareroot	Container	Total
GEORGIA	203,043,197	128,054,709	331,097,906
S. CAROLINA	141,135,755	1,011,264	142,147,019
ARKANSAS	104,535,133	0	104,535,133
ALABAMA	83,299,933	10,022,603	93,322,536
MISSISSIPPI	79,019,000	10,158,400	89,177,400
TEXAS	87,496,838	0	87,496,838
N. CAROLINA	53,561,200	14,697,000	68,258,200
FLORIDA	54,800,613	5,383,566	60,184,179
LOUISIANA	0	46,599,000	46,599,000
VIRGINIA	31,140,400	0	31,140,400

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**GEORGIA
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The Georgia Forestry Association serves as the leading advocate for a healthy business and political climate for Georgia's forest environment, forest landowners and forest-based businesses.

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