2020 ANNUAL REPORT

ON FOREST CONDITIONS IN SOUTH CAROLINA

South Carolina
Forestry Commission

STATE FORESTER'S MESSAGE

Forestry continues to be a pillar of our state's economy, as evidenced by the new economic contribution study the Forestry Commission conducted last year, which showed that forestry contributes $21.2 billion annually while providing more than 98,000 jobs and $4.9 billion in annual labor income. Compared to other leading industries in the Palmetto State, forestry ranks #1 in jobs, #2 in labor income, and #3 in direct economic output.

Overall, forestry continues to be a vibrant part of our state's economy with impacts visible in every county. Recent announcements and new investments in our industry along with our strong timberland base will ensure that forestry will continue to be an important part of South Carolina's growing economy. And while producing all these positive economic impacts, the active management of our forests also produces clean air, clean water, recreational opportunities, wildlife habitat and the beauty that draw people to our state.

Scott Phillips

South Carolina State Forester

BY THE NUMBERS: SC FORESTRY FACTS & FIGURES, FY2018-19

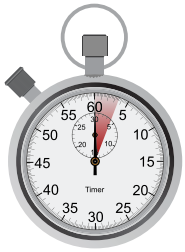
Forest Management

- 2,013 landowners assisted
- 1,141 cost-share, stewardship and/or woodland exams performed, covering 73,558 acres
- SCFC conducted 13,093 acres of prescribed burns, plowed 910 miles of firebreaks, performed 3,389 acres of prescribed-burn standbys and installed 135 waterbars

Fire Statistics

- 995 wildfires
- 4,128 forested acres burned
- 709 non-forested acres burned
- 543 fires caused by debris burning, the no. 1 cause in SC (54.6% of all wildfires in SC in FY2018-19)
- 322,978 burn notifications handled by automated call center

Fire Response



- The Commission's three dispatch centers field between 26,000 and 55,000 calls every year
- The average dispatch time for wildfires in FY2018-19 was 2 minutes, 22 seconds
- The average response time between report of wildfire and arrival of initial attack warden was 37.87 minutes

Investment

- $104 million in forestry capital projects announced in FY2018-19
- 98 primary mills
- ~800 secondary mills
- 47,000+ forest industry jobs
- $2.58 billion in labor income

Ownership

- More than 200,000 forest landowners in SC
- 87% of SC forests are privately owned
- 63% of private forests are family-owned
- The average "family forest" is 80 acres. 56% of these owners have their primary residence on the land
- Forest industries own 330,000 acres, down 84% since 2001
- Public agencies manage 13% of South Carolina's forests

Enforcement

- 38 sworn officers
- 223 fire investigations
- 43 fire tickets, 12 violations of state forest regulations, 2 pine straw theft cases, 11 game and fish cases, and 5 miscellaneous cases
- 3 arrests made for woods arson
- 112 timber theft/fraud cases
- $7,234 in fines collected
- 78% or $272,313 of timber theft/fraud losses recovered for victims

Wood Supply

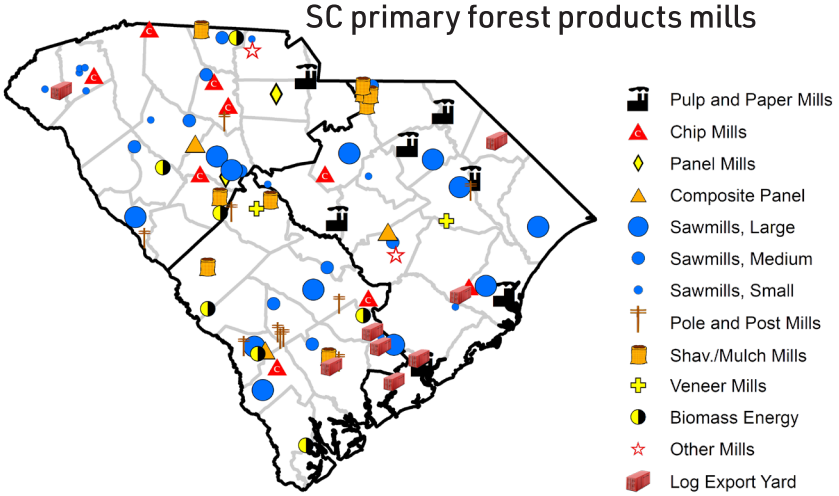
- 12.9 million acres of forestland, composed of 52% hardwood and 48% softwood
- SC's forests now contain 26.6 billion cubic feet of wood, more than at any time in the past century
- There are 2 million more acres of forestland in SC than there were in 1936.
- The state's forests, both hardwood and softwood, are growing more wood than is being harvested

FAST FACTS ABOUT SC FOREST PRODUCTS, FY2018-19

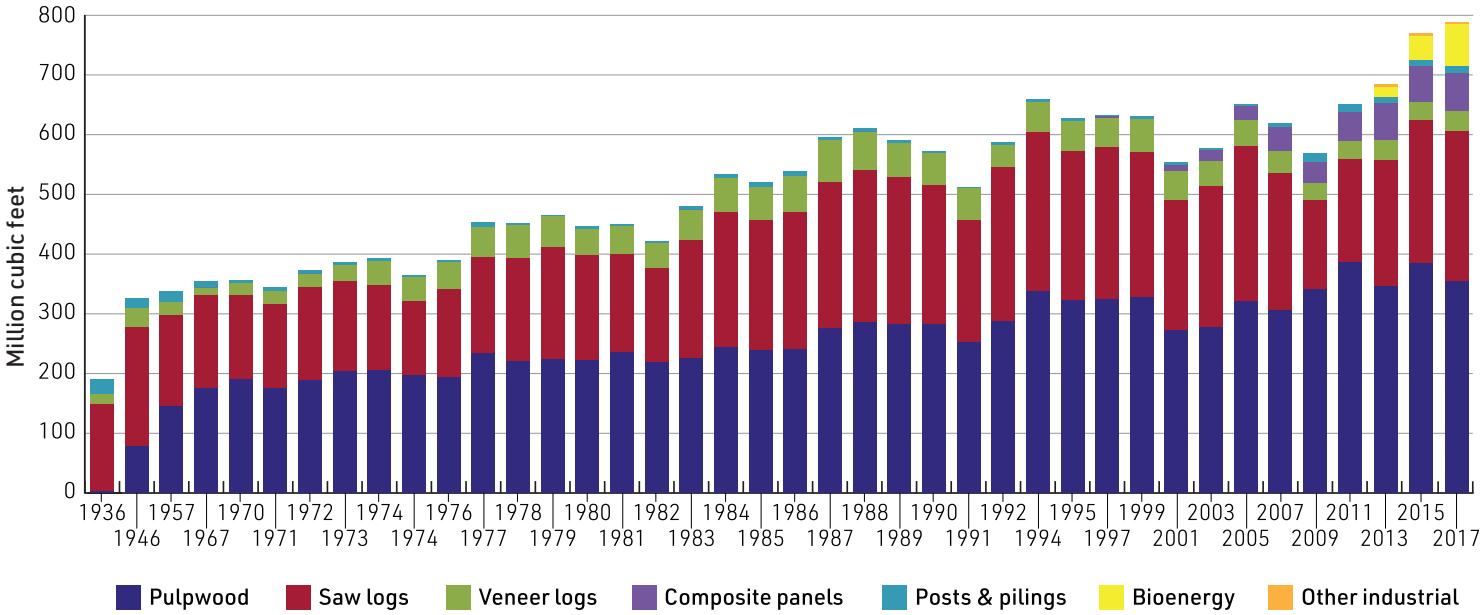
Did you know...?

- Pulpwood is the state's leading forest product by volume, though production decreased by 8% between 2015 and 2017. Pulpwood is also South Carolina's most valuable forest product, accounting for $458 million (~42%) of delivered timber value. Sawtimber production increased 5% between 2015 and 2017 to 250 million cubic feet and a delivered value of $417 million.
- Standing timber volumes and annual growth are at record levels and continue to increase, offering opportunities for expanded mill production, growth in job numbers, and improved landowner financial returns.
- Roundwood harvested from South Carolina's forest increased 2.3% between 2015 and 2017, to over 781 million cubic feet.
- South Carolina exported $1.41 billion in forest products in 2018, and also $1.39 billion on average over the previous five years.

SC primary forest products mills



Production of primary timber products in South Carolina



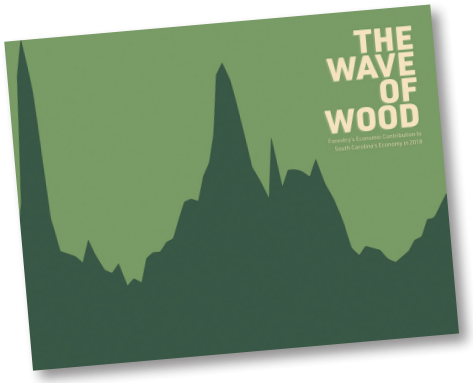
VALUE OF SC'S TIMBER DELIVERED TO MILLS, 2017

County	Acres of Forestland	Percent Forest	Harvested Timber Value		Delivered Value Rank
			Stumpage	Delivered	
Abbeville	258,514	75%	$9,287,173	$17,221,196	31
Aiken	429,724	66%	$11,340,061	$24,357,491	18
Allendale	188,801	65%	$10,956,935	$20,961,914	23
Anderson	187,835	43%	$2,989,475	$5,918,425	44
Bamberg	194,802	85%	$11,150,856	$23,240,801	21
Barnwell	295,691	82%	$7,967,906	$16,578,976	33
Beaufort	126,795	32%	$3,020,554	$6,718,324	43
Berkeley	560,864	80%	$17,854,004	$41,798,401	7
Calhoun	170,721	66%	$4,582,655	$10,301,729	40
Charleston	290,051	47%	$5,535,627	$12,738,149	36
Cherokee	184,719	76%	$4,533,105	$8,913,895	41
Chester	308,506	86%	$11,482,007	$23,761,163	19
Chesterfield	372,982	73%	$16,353,705	$32,730,172	8
Clarendon	227,130	58%	$12,057,156	$26,252,963	15
Colleton	495,764	74%	$31,837,229	$67,123,786	1
Darlington	159,574	45%	$9,485,720	$20,920,742	25
Dillon	144,098	56%	$7,815,811	$15,583,687	34
Dorchester	258,920	72%	$13,467,748	$31,109,505	10
Edgefield	234,060	75%	$15,555,736	$29,450,884	12
Fairfield	398,751	88%	$23,234,441	$50,843,562	3
Florence	338,394	64%	$13,642,304	$28,966,817	13
Georgetown	416,817	73%	$26,171,471	$57,399,379	2
Greenville	215,066	45%	$3,585,305	$7,614,792	42
Greenwood	212,084	70%	$10,074,222	$18,442,221	29
Hampton	246,845	72%	$23,793,585	$44,170,690	5
Horry	468,514	63%	$14,573,239	$32,149,733	9
Jasper	314,251	75%	$10,019,422	$19,419,511	28
Kershaw	338,966	72%	$11,014,911	$25,364,228	16
Lancaster	266,882	76%	$8,838,992	$20,253,991	27
Laurens	333,591	74%	$8,841,709	$17,109,488	32
Lee	122,038	47%	$8,060,780	$17,244,602	30
Lexington	251,237	52%	$7,431,757	$14,789,467	35
McCormick	198,523	90%	$6,137,103	$11,371,779	38
Marion	222,371	73%	$9,189,236	$20,289,437	26
Marlboro	227,272	69%	$12,339,560	$25,197,815	17
Newberry	345,786	81%	$14,948,626	$30,077,765	11
Oconee	251,354	66%	$2,233,569	$4,715,740	45
Orangeburg	440,142	62%	$18,789,449	$42,687,485	6
Pickens	228,384	70%	$1,728,125	$3,744,954	46
Richland	305,082	66%	$9,230,107	$20,954,130	24
Saluda	208,593	74%	$11,010,199	$22,152,984	22
Spartanburg	216,728	42%	$5,752,554	$11,830,728	37
Sumter	275,647	64%	$11,857,570	$26,948,229	14
Union	258,180	82%	$10,162,437	$23,305,652	20
Williamsburg	407,098	71%	$23,138,222	$48,877,501	4
York	260,125	58%	$5,021,659	$10,618,652	39
All Counties	**12,858,272**	**66%**	**$518,094,015**	**$1,092,223,537**	**– –**

Timber values are based on results of the 2017 Timber Products Output (TPO) Survey. "Acres of Forestland" and "Percent Forest" fields are based on 2017 estimates from the Forest Inventory and Analysis (FIA) program. Both programs are jointly administered by the USDA Forest Service - Southern Research Station and the South Carolina Forestry Commission. TPO numbers are designed to be interpreted at the state level. FIA numbers are designed to be interpreted at the state survey unit level.

NEW STUDY DOCUMENTS FORESTRY'S SIZEABLE ECONOMIC IMPACT IN SC

The Forestry Commission recently published the results of an economic contribution study the agency conducted based on 2018 data. Titled "The Wave Of Wood," the analysis documents the forestry-related economic activity of every sector of the industry from paper, solid wood products and forest recreation to timber, logging and furniture.



The full economic contribution study is available for download at: www.trees.sc.gov/forest/pubs/scfcimplaneconomicimpactstudy2018-web.pdf

Study Highlights

- The allied sectors of forestry contribute $21.2 billion to South Carolina's economy
- Forestry employs more than 98,000 people in South Carolina
- Forestry generates $4.9 billion in annual labor income.
- Four out of every 100 employed residents in South Carolina support their families with forestry salaries.
- Forestry's economic contribution translates to $4,218 in sales per South Carolina resident.
- Every $1,000 spent on forest products made in the Palmetto State generates an additional $520 in sales in rural communities.
- Forestry businesses in South Carolina paid $232.4 million in direct taxes on production and imports at the federal, state and local levels.

Annual Economic Contribution of Forestry to South Carolina's Economy, 2018

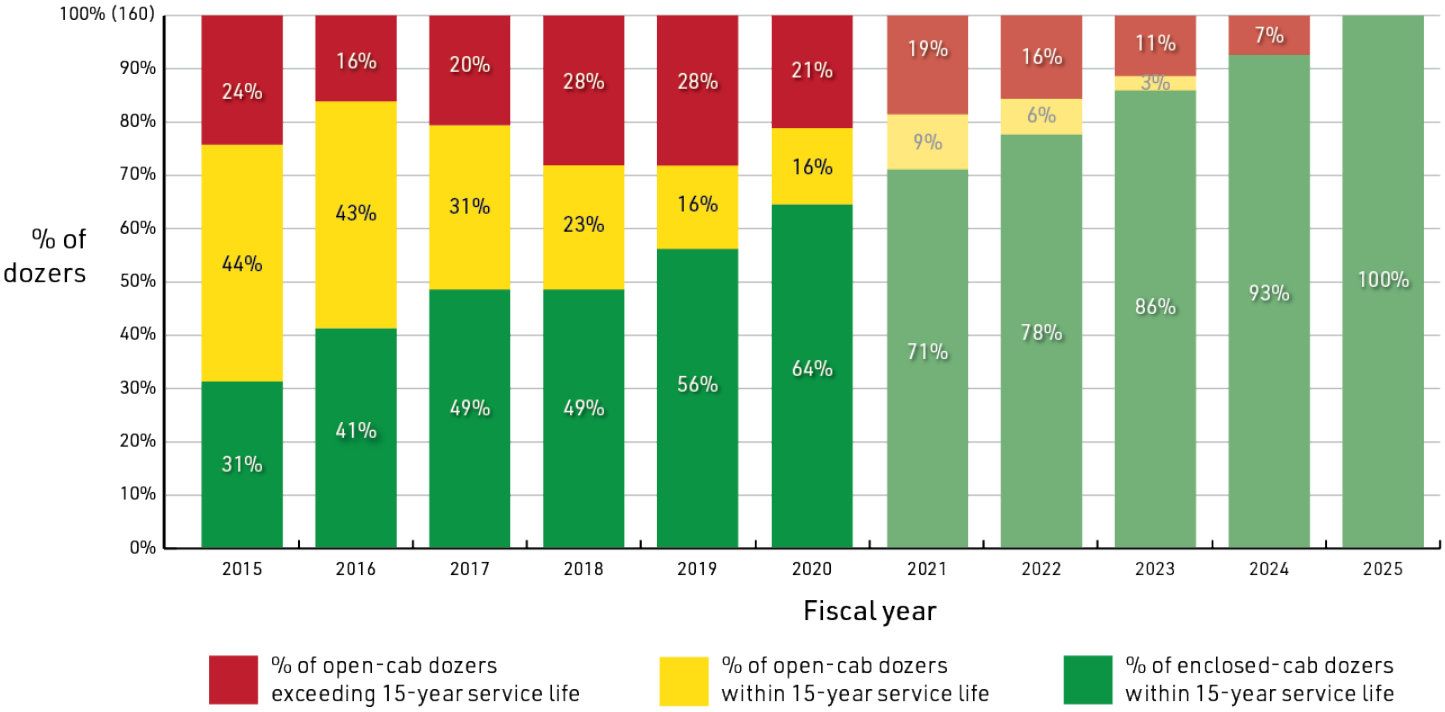
	Contribution					
Metric	Direct	Indirect	Induced	Total	% Change From 2017	Multiplier (Total / Direct)
Employment (No. of Jobs)	47,047	28,198	23,060	98,306	16.4%	2.09
Labor Income (Million USD)	$2,577.6	$1,467.6	$912.0	$4,957.4	9.9%	1.92
Value Added (Million USD)	$4,898.5	$2,288.0	$1,678.7	$8,865.2	1.0%	1.81
Output (Million USD)	$13,917.3	$4,296.1	$2,980.7	$21,194.1	0.7%	1.52

FRONTLINE FIREFIGHTING FLEET BECOMING SAFER

Thanks to help from the General Assembly the Commission has made significant progress since 2012 putting firefighters in safer enclosed-cab bulldozers. Open-cab bulldozers are being replaced with safer, enclosed environmental cabs as quickly as state appropriations are allowing. Replacement reduces the risk of injuries and deaths to firefighters, and allows them to better serve the public that we protect.

With the recurring funding the agency is requesting this year, we can reach our goal of having a full fleet of enclosed-cab bulldozers by 2026 and maintain our fleet on a 15-year safe replacement cycle going forward.

To maintain a reliable dozer fleet, dozer units should be kept on a 15-year replacement cycle. In order to meet a 15-year replacement cycle, the agency needs to purchase 11 to 12 dozer units (dozer, plow and transport) annually. Each unit cost approximately $318,000, which requires $3.8 million each year. Currently the agency receives approximately $1.8 million through Act 273 plus $1 million recurring received in FY2020 appropriations. The requested $1 million in recurring funds will guarantee the $3.8 million annual need to maintain a reliable fleet and ensure that safe firefighting equipment is available to fulfill the agency's mission.

Replacement Schedule of Frontline Firefighting Units

at requested recurring funding level