THE STATE OF FORESTRY
IN SOUTH CAROLINA
OUR FORESTS

- 12.9 million acres of forestland
- 67% of SC’s land area is forested
- Live-tree volume: 26 billion cubic feet
- 52% hardwood / 48% pine types
- 24% planted pine, produces >50% of timber supply
- 87% private / 13% public
- 207,000 family forest owners (86,000 own 10+ acres)
- Growth exceeds harvest
- Timber volumes at record levels
- Scarcity of pulpwood-sized pine in the coastal plain region
TIMBER VOLUMES AT RECORD LEVELS

TIMBERLAND AREA AND LIVE-TREE VOLUME, SOUTH CAROLINA

- **Planted Stands**
- **Natural Stands**

<table>
<thead>
<tr>
<th>Year</th>
<th>Area (million acres)</th>
<th>Volume (billion cubic feet)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1936</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>1947</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>1958</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>1968</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>1978</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>1986</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>1993</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>2001</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>2006</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>2011</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>2017</td>
<td>12</td>
<td>12</td>
</tr>
</tbody>
</table>
DEMAND IS GROWING!

SOUTH CAROLINA PRODUCTION OF PRIMARY TIMBER PRODUCTS
1936-2015

- Pulpwood
- Saw logs
- Veneer logs
- Composite panels
- Posts & pilings
- Bioneergy
- Other Industrial

VOLUME OF ROUNDWOOD PROCESSED (MILLION CUBIC FEET)

[Bar chart showing production trends from 1936 to 2015]
## RECENT ANNOUNCEMENTS/EXPANSIONS

<table>
<thead>
<tr>
<th>Date</th>
<th>Company</th>
<th>Investment ($M)</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct 18</td>
<td>GP OSB Mill</td>
<td>$4.5</td>
<td>0</td>
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<tr>
<td>Aug 18</td>
<td>Interfor</td>
<td>$40</td>
<td>7</td>
</tr>
<tr>
<td>July 18</td>
<td>Jasper Pellet Company</td>
<td>$8.1</td>
<td>27</td>
</tr>
<tr>
<td>Jan 18</td>
<td>Tree Brand Packaging</td>
<td>$1.3</td>
<td>28</td>
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<tr>
<td>Feb 18</td>
<td>Kapstone Paper &amp; Packaging</td>
<td>$6</td>
<td>0</td>
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<tr>
<td>Mar 18</td>
<td>Charles Ingram Lumber</td>
<td>$33</td>
<td>22</td>
</tr>
<tr>
<td>Mar 18</td>
<td>Low Country Case &amp; Millwork</td>
<td>$7</td>
<td>10</td>
</tr>
<tr>
<td>May 18</td>
<td>Canfor Southern Pine</td>
<td>$40</td>
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<tr>
<td>May 18</td>
<td>Universal Forest Products</td>
<td>$6.1</td>
<td>120</td>
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<tr>
<td>Nov 17</td>
<td>WestRock</td>
<td>$410</td>
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<tr>
<td>Sep 17</td>
<td>Collum's Lumber Products</td>
<td>$2</td>
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</tr>
</tbody>
</table>

Total capital investment for FY2017-18 – FY2018-19: $558 million / 224 new jobs
Recent Announcements/Expansions

From 2004 - present
- 103 forest product announcements
- 17 greenfield mills (11 primary, 6 secondary)
- 10 sawmill expansions/upgrades
- >$6 billion in capital investment
- >5,600 new jobs
SC FORESTRY’S ECONOMIC IMPACT

21 BILLION DOLLAR ECONOMIC IMPACT ON SOUTH CAROLINA

>84,000 JOBS

$1.3b IN EXPORTS

#1 HARVESTED CROP

#1 EXPORT COMMODITY
HURRICANE FLORENCE

RESPONSE
- Burning ban
- Round-the-clock staffing at SEOC
- LE & Aviation assisted with lane reversals and reconnaissance
- Chainsaw strike teams
- Incident management team deployed 3 times

ASSESSMENT
- Began assessing damage after storm by air, by ground and by consultation with foresters, loggers, mills, etc.

DAMAGE/IMPACTS
- Timber damage/loss very minimal
- Flooding major issue, causing damage mostly to infrastructure
- Seedling mortality very minimal
- Downtime at mills
Public/private partnership with ArborGen to deliver advanced-genetics seedlings to timberland owners:

- ↑ production (30 million seedlings)
- Greater selection of seedlings
- Retains SC genetics
- Enhanced customer service
- Discounts for SC landowners
As a full member of the cooperative, we again have access to loblolly pine germplasm that is needed for establishment of future orchards.
SAFETY IS PRIORITY #1

SCFC Firefighting Dozers, By Service Life Category
FY2018

- 43 open-cab dozers exceeding 15-year service life (27%)
- 39 open-cab dozers within 15-year service life (24%)
- 78 enclosed-cab dozers within 15-year service life (49%)
SAFETY IS PRIORITY #1

Projected # Of Enclosed-Cab Dozers With Act 273 Funding + $2 Million In Recurring Funds

Goal = 160 enclosed-cab dozers

Projected # Of Enclosed-Cab Dozers With Act 273 Funding Only

Goal = 160 enclosed-cab dozers

End of 15-year service life of first enclosed-cab models received in 2012
SERVING THE FORESTRY COMMUNITY