Harvest, Value and Consumption of Nontimber Forest products in the US

Montreal Process Indicator Summary

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2009

More data is available from the BLM and USFS than for the previous US Report

In 2000, the appropriations law HR2466 was implemented, specific to the USFS.

"Pilot program of charges and fees for harvest os forest botanical products"

Appraisals and data collection have been implemented or increased in both agencies.

Information sources

- Permit and contract data from the USFS and BLM (“nonconvertable” product data)
- State and Federal game and furbearer data
- International trade data
- Census county employment data
- Association and other NGO data

Commercial sales of NTFPs from Federal lands were divided into 9 categories

Nursery and landscaping

Arts, crafts, floral

Regeneration and silviculture

Edible fruits, nuts, berries

Grass, hay, alfalfa, forage

Herbs and medicinals

Fuelwood

Posts and poles

Christmas trees

To calculate value, Federal sales were used as a proxy for all NTFP sales nationwide

- Permit and contracts sold by the USFS and BLM represent about 10% of first point of sales value (shed value).
- USFS sales represent about 20% of supply nationwide, and BLM about 2%, based on proportion of forested land area.
- Shed value is about 40% of wholesale price.

Estimated wholesale value of wild-harvested nontimber resources in the US, millions 2007 US$.

Product Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Landscaping	89	73	57	54	49	43	38	37	30	31
Crafts/Floral	120	104	84	112	128	124	120	93	95	152
Regeneration seed/cones	6	2	5	5	12	6	3	5	3	4
Edible fruits, nuts, sap	56	38	41	56	45	49	60	48	38	46
Grass/forage	15	14	16	19	19	19	18	26	20	20
Herbs, medicinals	1	2	2	1	3	3	2	2	2	2
Fuelwood	399	364	311	311	311	307	301	288	294	331
Posts and poles	90	65	68	35	32	40	30	35	29	26
Christmas trees	114	93	97	102	93	95	82	87	71	71
total	890	754	682	694	692	686	654	621	581	682

International trade of NTFPs is significant

2007 top four exports, value in million $US

Pecans	$187
Foliage and branches	$133
Wild blueberries	$48
Wild ginseng	$38

2007 top four imports, value in million $US

Pecans	$147
Maple syrup products	$142
Wild blueberries	$109
Foliage and branches	$96

Even with more data, its still tough to see trends

We still can’t determine the level of harvest that could be considered “sustainable”, or get more than a rough estimate of value or consumption.

Some trends appear clear, although the reasons for the apparent trend may be complex.

Quantity of Edible Fruits, Nuts, Berries, and Sap permitted for harvest on NFS and BLM land by year.

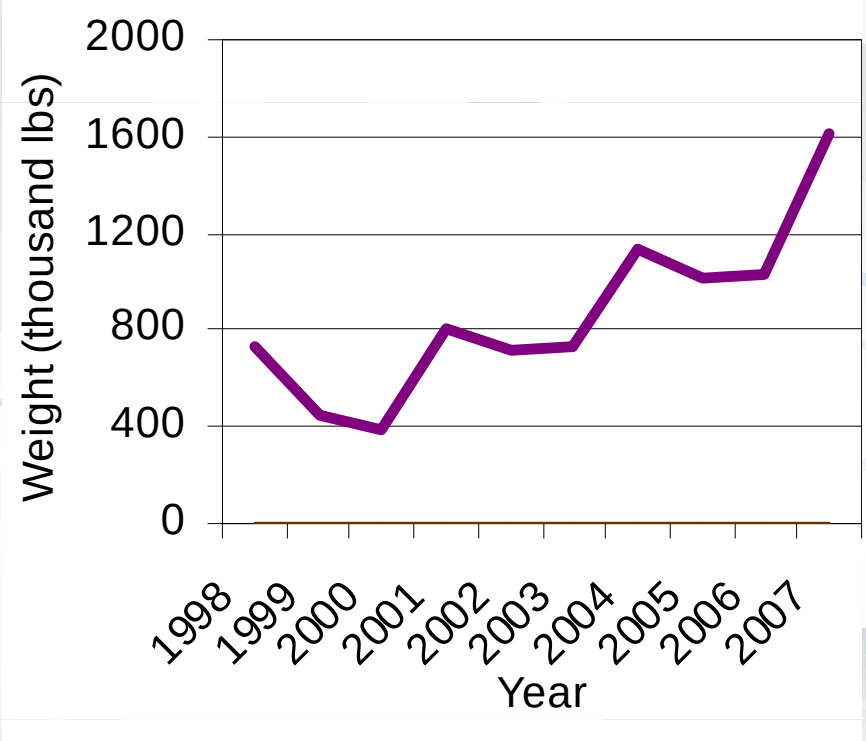

Figure provided by
Sonja Oswalt

Other products are part of complex markets with no clear trends

Quantity of top 6 wild-harvested dried plants for 1999 to 2005 as reported by the American Herbal Products Association

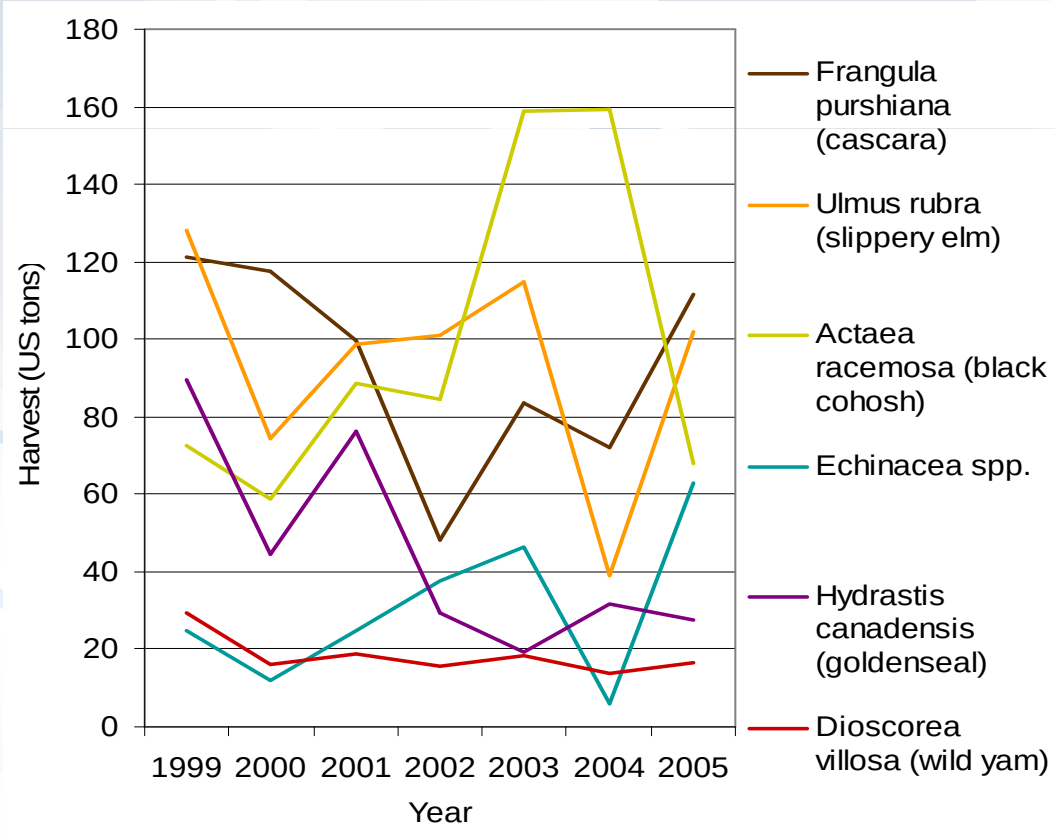

Figure provided by Sonja Oswalt

Trade in NTFPs has been a small but regionally important part of the US economy for generations

- As domestic local markets develop, regional consumption of locally harvested wild products has become more common.
- International demand for many of these products continues even during economic downturns.
- Trade is affected by many factors, including globalization of labor markets, movement of processing to countries with competitive advantages, and changes in taste or style.
- The informal sector of the economy still plays a significant role.