

Criterion 6. Maintenance and Enhancement of Long-Term Multiple Socioeconomic Benefits To Meet the Needs of Societies

National Report on Sustainable Forests—2010

Indicator 6.26.

Value of Nonwood Forest Products Produced or Collected

What is the indicator and why is it important?

Nonwood forest products are items harvested or gathered from forests that are not traditional wood products. Nonwood forest products are important components of the economic value of forests and their collection and processing makes an important contribution to economic activity. Many of these products also are important to indigenous people and others for their contribution to cultural values and subsistence activities.

In this indicator we cover nontimber forest products (NTFP), which includes both (1) nonwood products that do not include the main stem of trees, and (2) selected secondary wood products—fuelwood, posts and poles, and Christmas trees that do include the main stem of trees. The secondary wood products are included because we estimate their value using the same methods as for nonwood products. We also include the value of game animals taken by hunting and trapping.

What does the indicator show?

The value of permit and contract sales of nontimber forest products (NTFP) from Forest Service and BLM land declined overall by about 30 percent between 1998 and 2007, from \$9.5 to \$6.5 million (all dollar figures adjusted for inflation and reported in 2005 dollars). Nonwood products decreased 18 percent and secondary wood products decreased 36 percent (table 26-1). These fluctuations are expected with products that fruit better in some years than others, such as fungi or pine

nuts. The nonwood products value declined from \$2.6 to \$2.1 million and the secondary wood products value declined from \$6.9 to \$4.4 million.

Nonwood products include many plants, lichens, and fungi from forests, including understory species used in floral markets, for seasonal greenery, as wild foods, for medicinals, as plant extracts, and for transplants.

Secondary wood products include fuelwood, posts and poles, and Christmas trees. Production of these items is significant in many regions.

Although annual or regularly collected data on domestic production and prices for NTFPs are generally not available, permit and contract data from the Forest Service and the Bureau of Land Management (BLM) can serve as a benchmark to assess use and value for many NTFPs. Information about game animal and fur-bearer populations and harvest is collected by State and Federal agencies, but national information is not generally available for all species. Prices for many NTFPs in the United States are influenced by international supply and demand, by seasonal fluctuation in availability, and by rising domestic demand. Forest Service and BLM sales data are used to assess NTFP first point of sales value by several categories, including landscaping uses; crafts and floral uses; regeneration and silvicultural seeds and cones; edible fruits, fungi, nuts, and saps; grass, hay, and forage; herbs and medicinals; and for three categories of secondary wood products, including fuelwood, posts and poles, and Christmas trees.

Table 26-1. Receipts for wild-harvested nontimber resources from Forest Service and Bureau of Land Management permits and contracts, 1998–2007 (millions of 2005 dollars).

Product Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Landscaping	0.8	0.6	0.5	0.5	0.4	0.4	0.3	0.3	0.2	0.2
Crafts/floral	1.1	0.9	0.7	1.0	1.2	1.1	1.0	0.8	0.8	1.2
Seed/cones	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0
Edible fruits, nuts, sap	0.5	0.3	0.4	0.5	0.4	0.4	0.5	0.4	0.3	0.4
Grass/forage	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.3	0.2	0.2
Herbs, medicinals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	2.6	2.1	1.8	2.2	2.4	2.2	2.1	1.8	1.6	2.1
Fuelwood	4.0	3.7	3.1	3.1	3.2	3.1	2.9	2.7	2.7	3.0
Posts and poles	0.9	0.7	0.7	0.4	0.3	0.4	0.3	0.3	0.3	0.2
Christmas trees	2.0	1.7	1.7	1.8	1.7	1.7	1.4	1.5	1.2	1.2
Total	9.5	8.1	7.3	7.5	7.7	7.5	6.8	6.3	5.8	6.5

It is possible to make a very rough estimate of total national wholesale value for those types of NTFPs that are provided from Forest Service and BLM land. First, assuming that the value per unit that the Forest Service and BLM receive is 10 percent of value per unit received at the first point of sales. Second, we assume that the Forest Service and the BLM provide particular proportions of total national production depending on the category. As a general guide about proportions we note that the national forest land constitutes about 20 percent of total forest land in the United States, and the BLM about 1.5 percent. Sometimes particular products are harvested more on Federal land than elsewhere, and sometimes less. The third step is to assume the first point-of-sale values are 40 percent of wholesale values. First point of sale value refers to the initial transaction by which a product enters the marketplace. It is comparable to farm values, which commonly run about 40 percent of wholesale value.

The resulting estimate in 2007 for national wholesale value of nonwood products produced was about \$232 million (down 19 percent since 1998) and for secondary wood products was about \$391 million (down 35 percent since 1998) for a total of about \$622 million (down 30 percent since 1998) (table 26-2).

These are very rough estimates, and actual values may be quite different. For example, alternate estimates of national first sale value for moss production value (part of the Crafts/

Floral category) have ranged from \$6 million to \$165 million compared to our estimate of first sale value of about \$55 million for that entire Crafts/Floral category in 2007.

What has changed since 2003?

NTFP appraisal methods and monitoring of commercial harvesting have improved considerably on Forest Service land as a result of the Federal Pilot Program of Charges and Fees for Harvest of Forest Botanical Products established in 2000. The law defines botanical products as florals, mushrooms, and so on removed from Federal forests (excluding wood products), defines fair market value, and requires that permit fees be based on a determination of fair market value and sustainable harvest levels.

Why can't the entire indicator be reported at this time?

More complete data on sources and values of NTFPs are needed beyond those presented from the Forest Service and BLM. The assumptions used to expand those estimates to total wholesale value cannot be defended as a continuing means to make complete estimates on the level and trend for this indicator. Prominent data gaps include personal use of NTFPs, and production and value from private lands. No single source of data exists for NTFPs, nor is it expected that there ever will be. It is unclear how consistent or comparable data sources are in terms of value and scale.

Table 26-2. Estimated wholesale value of wild-harvested nontimber resources in the United States, assuming Forest Service and Bureau of Land Management sales receipts are 10 percent of first point of sales value; Forest Service sales represent approximately 20 to 30 percent and Bureau of Land Management sales represent approximately 2 to 15 percent of total supply; and first point of sales value is 40 percent of wholesale price (millions of 2005 dollars).

Product Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Landscaping	89	73	56	54	51	44	37	35	28	28
Crafts/floral	119	105	83	112	134	126	118	87	89	138
Seed/cones	6	2	5	5	12	6	3	5	3	3
Edible fruits, nuts, sap	56	38	41	56	47	49	58	46	35	42
Grass/forage	15	14	16	19	20	19	17	24	19	19
Herbs, medicinals	1	2	2	0	3	3	2	2	1	2
Subtotal	285	234	202	246	267	247	236	199	175	232
Fuelwood	397	367	306	312	323	310	294	271	273	302
Posts and poles	89	65	67	35	33	40	29	33	26	24
Christmas trees	114	94	96	102	97	96	80	82	66	65
Total	885	760	671	695	720	693	639	585	540	622