

Wilderness declarations, Wild and Scenic river designations, and additions to Olympic National Park: Evaluating the cumulative economic impacts on Clallam and Jefferson counties.

Presentation to:



September 26, 2011

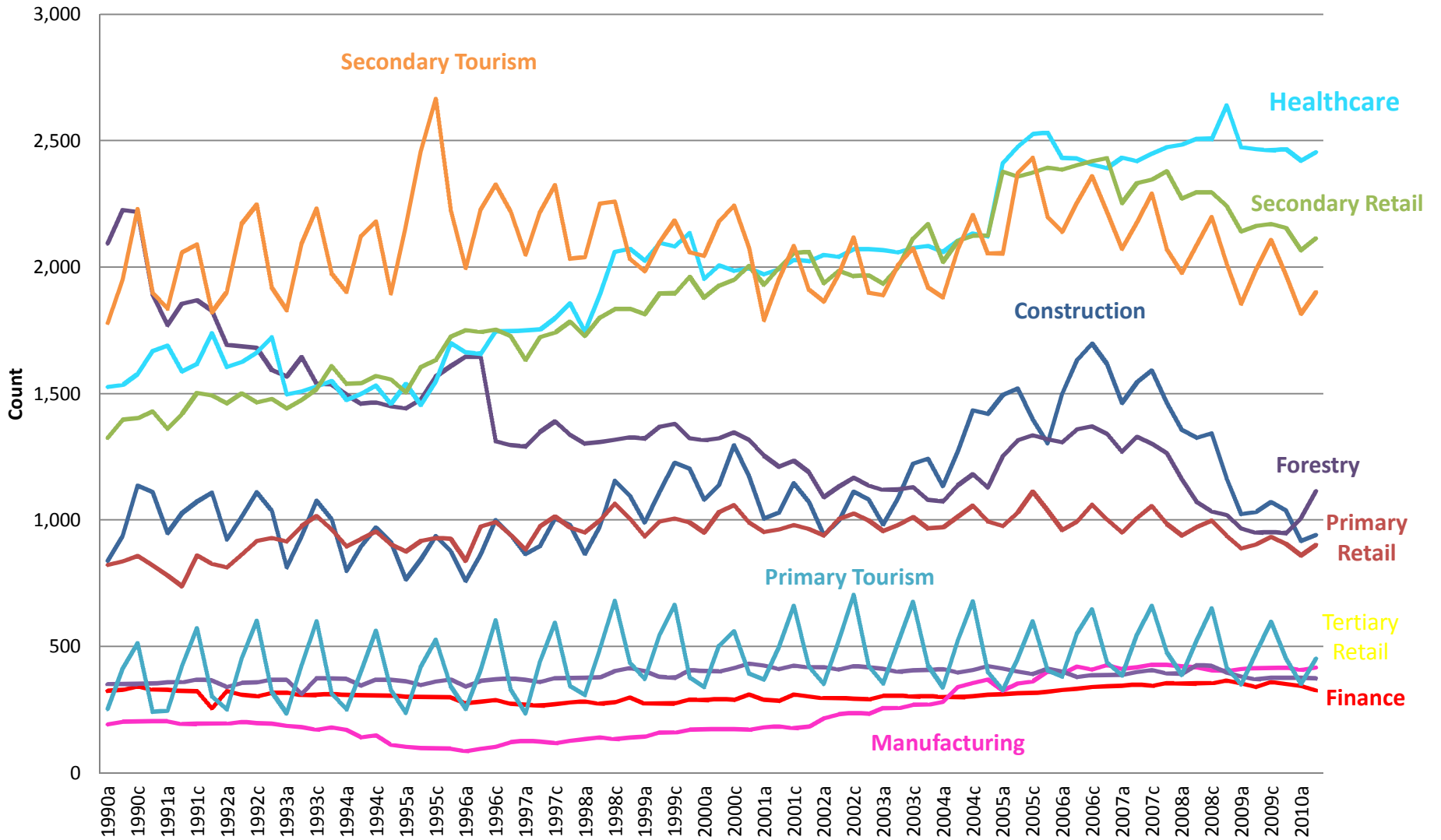
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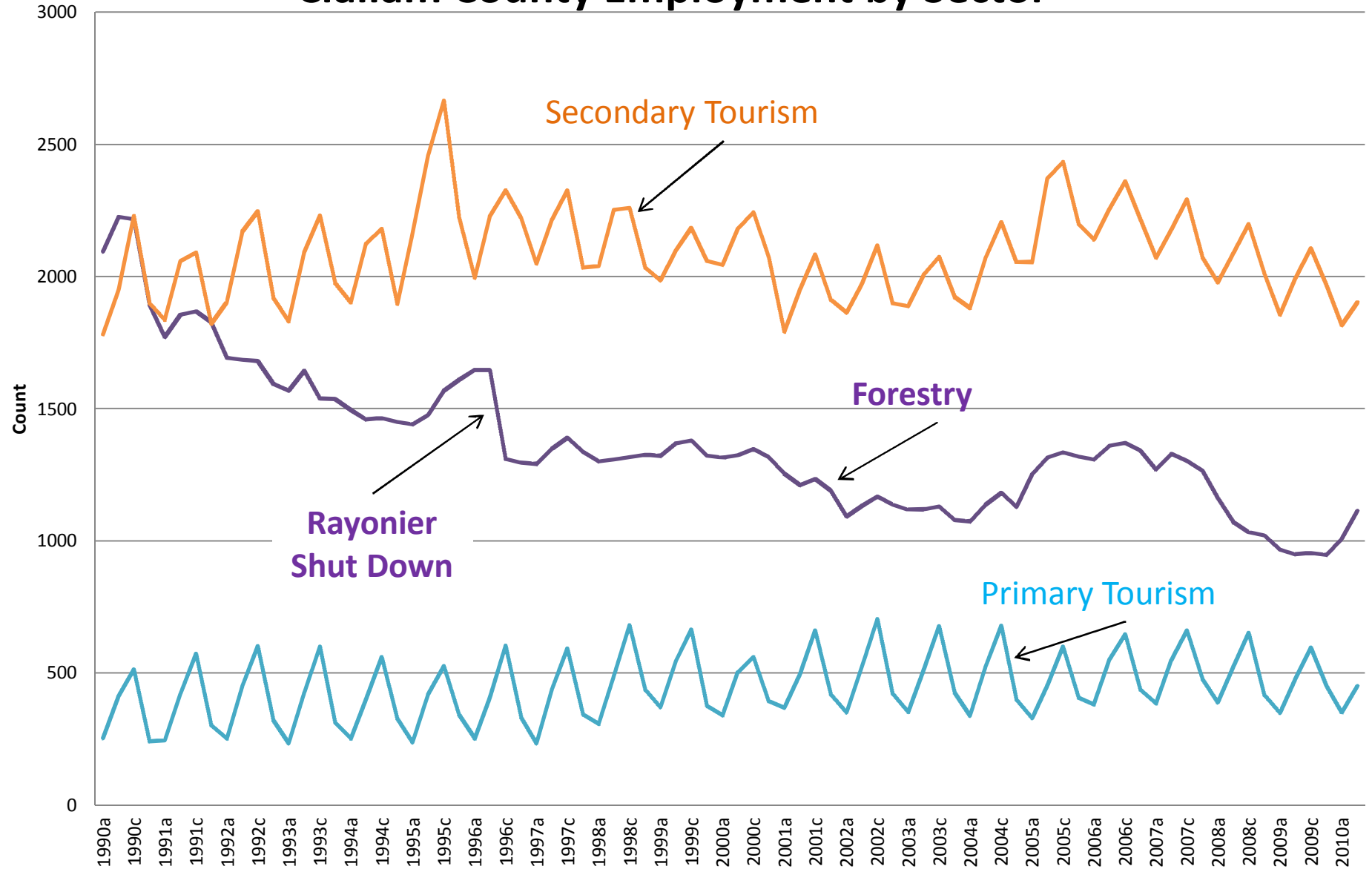
Overview

- Economies of Clallam & Jefferson Counties
 - Contributions of Forestry & Tourism Sectors
 - Wages
 - Employment
- Acres & Timber Volume Reserved By:
 - Wilderness Declarations
 - Wild & Scenic River Designations
 - Additions to Olympic National Park
- Economic Impacts
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 - Replacement Costs
- Perceptions Within Forest Sector

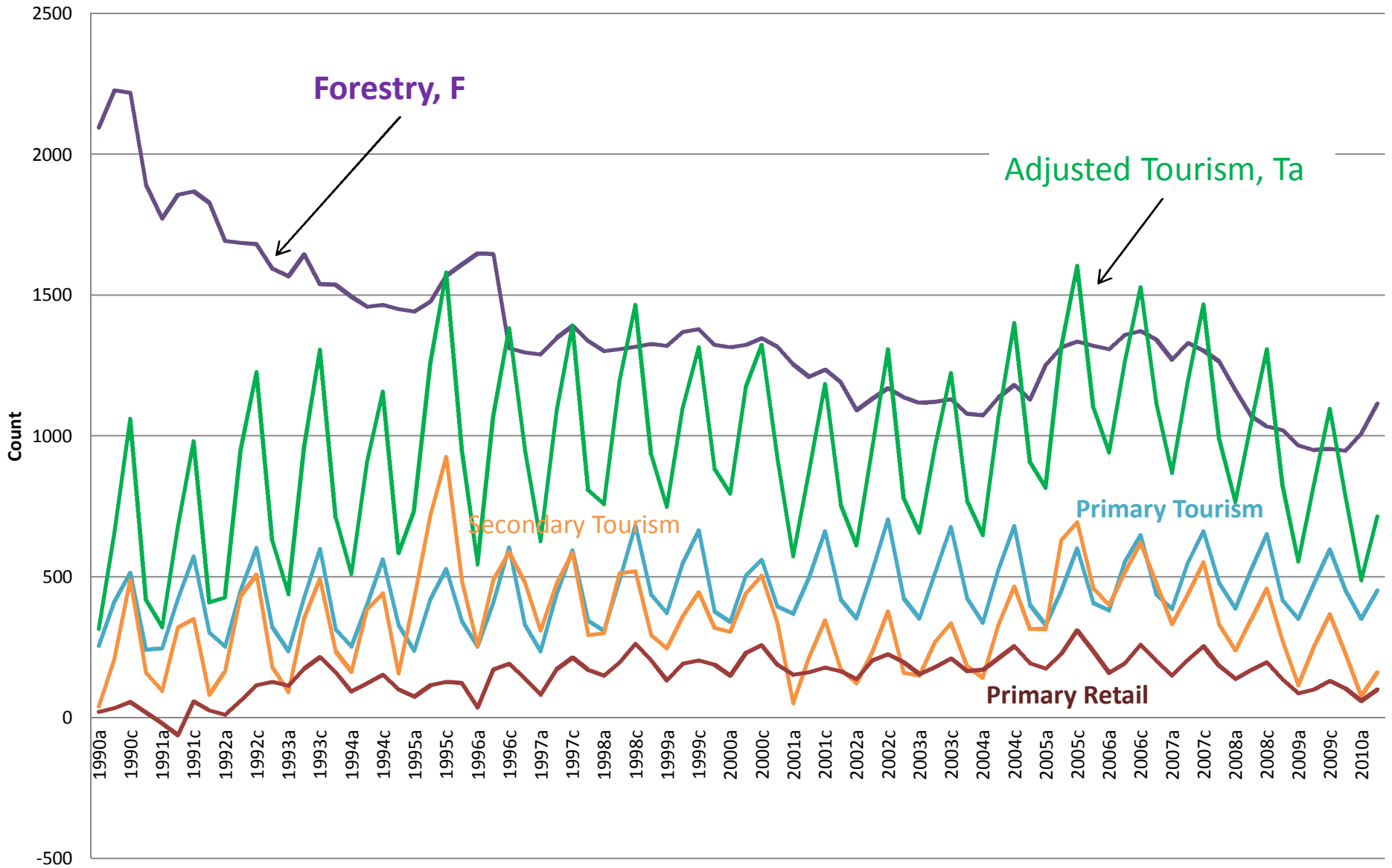
Clallam County Employment by Sector



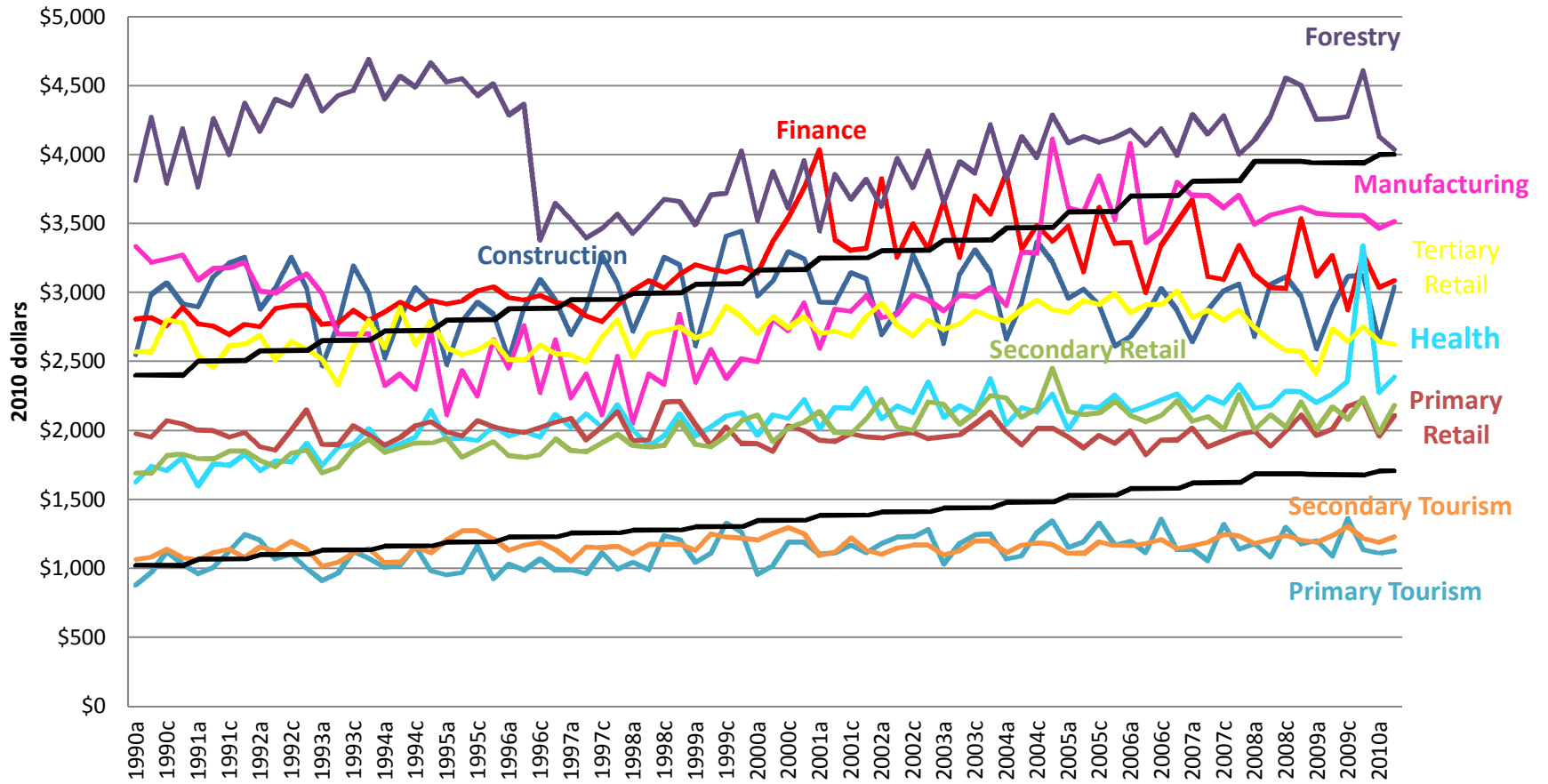
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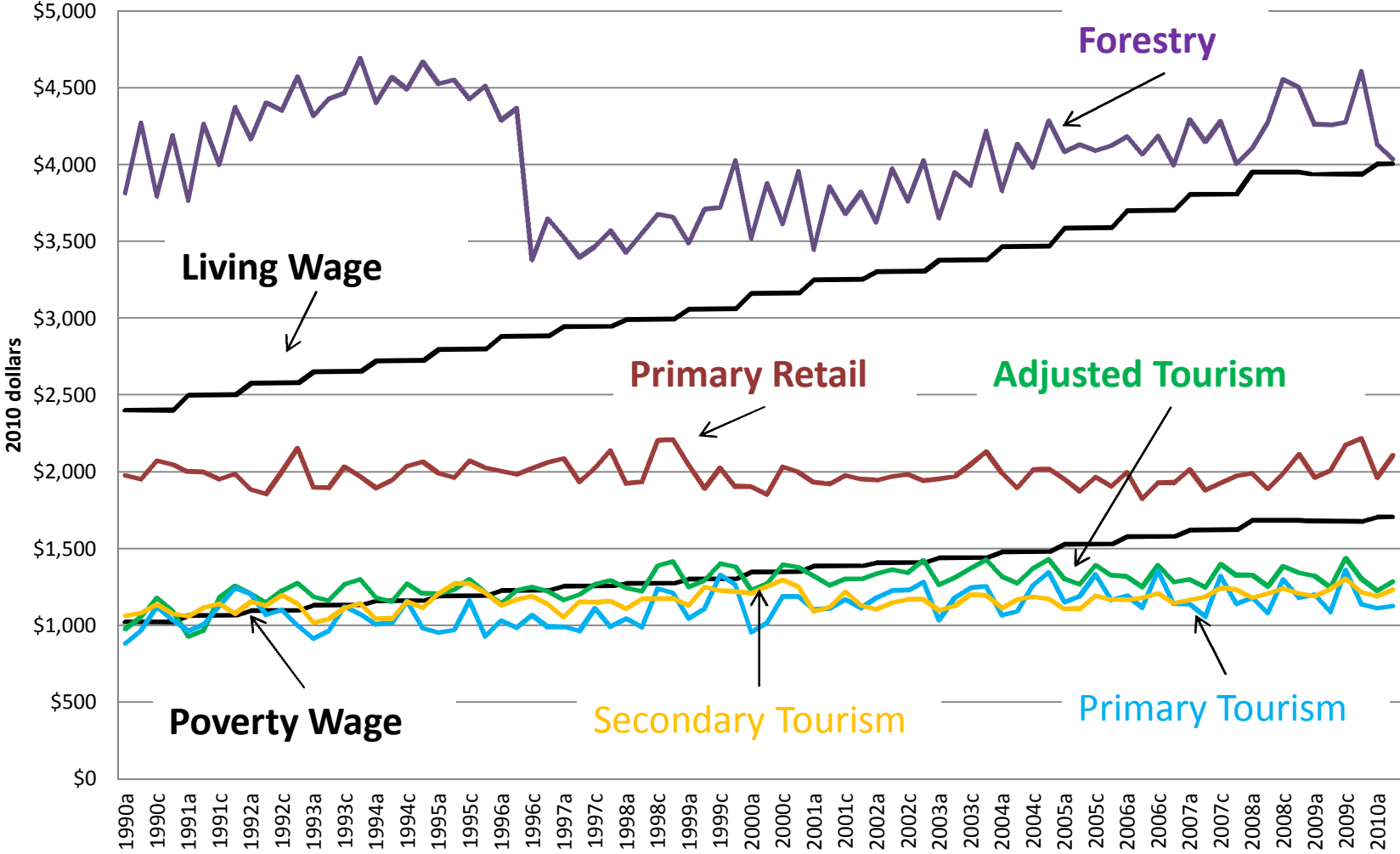
Clallam County Adjusted Employment by Sector



Clallam County Average Monthly Wages

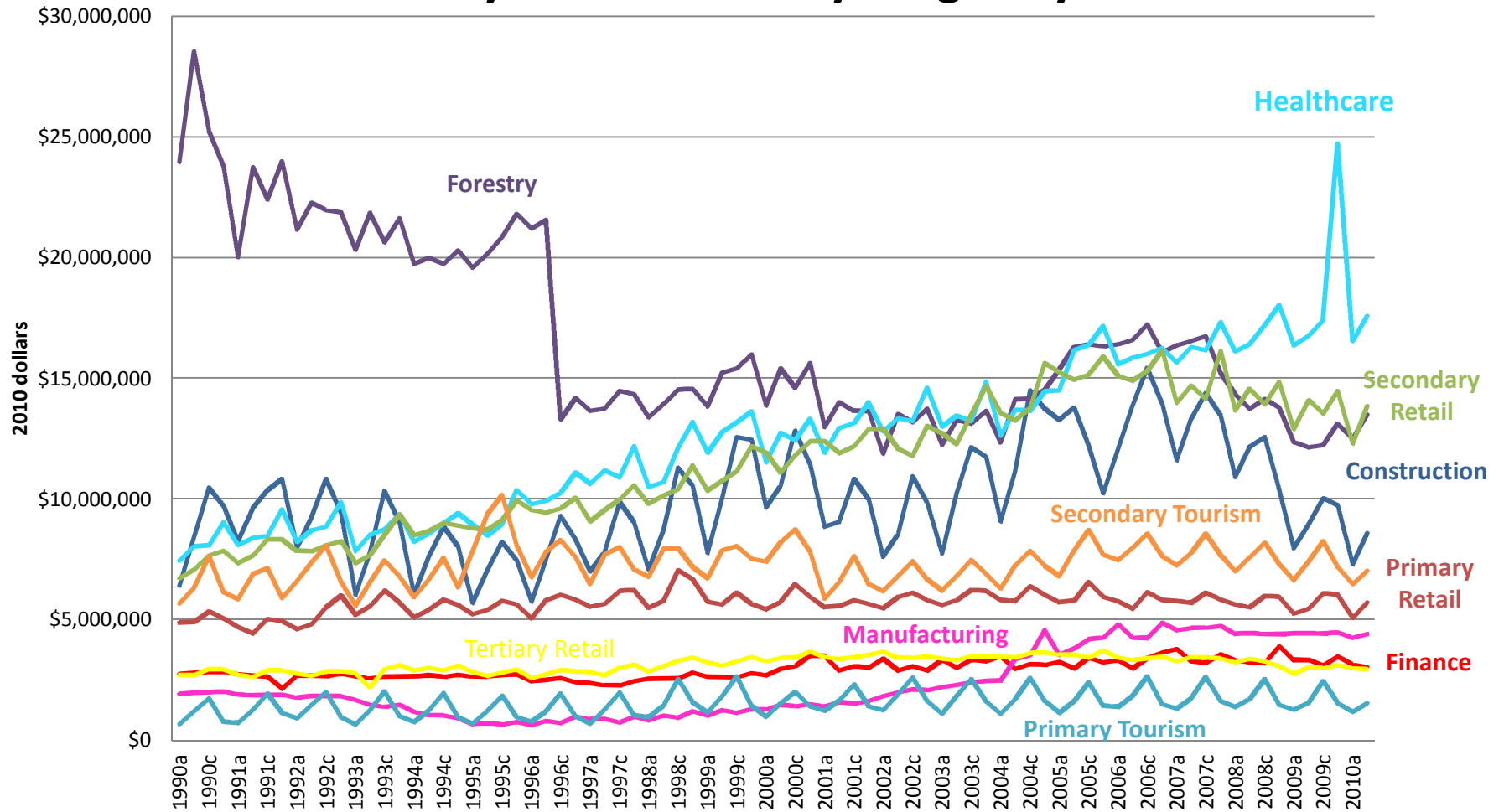


Clallam County Average Monthly Wages

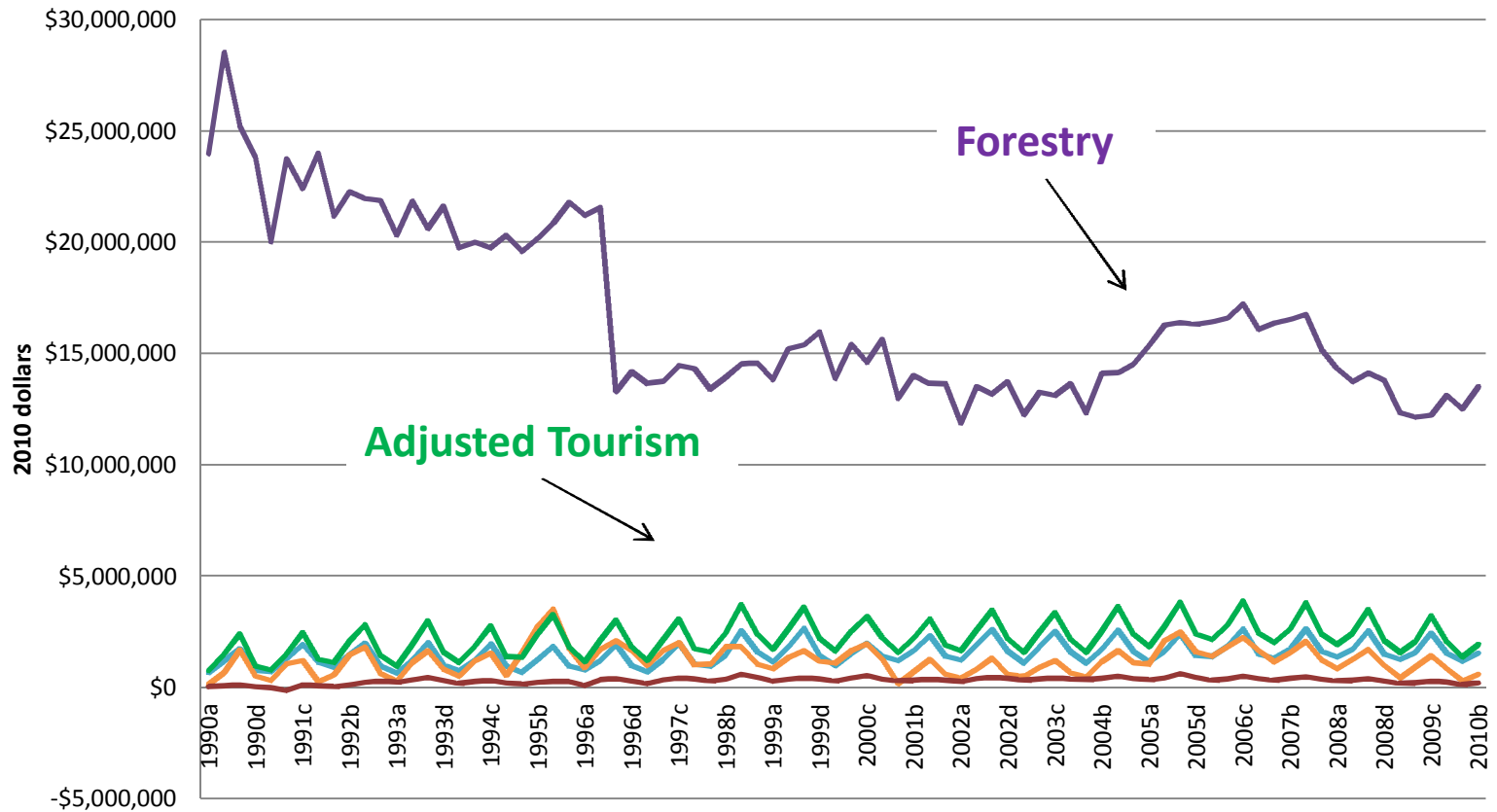


Economy of Clallam County 3

Clallam County Total Quarterly Wages by Sector

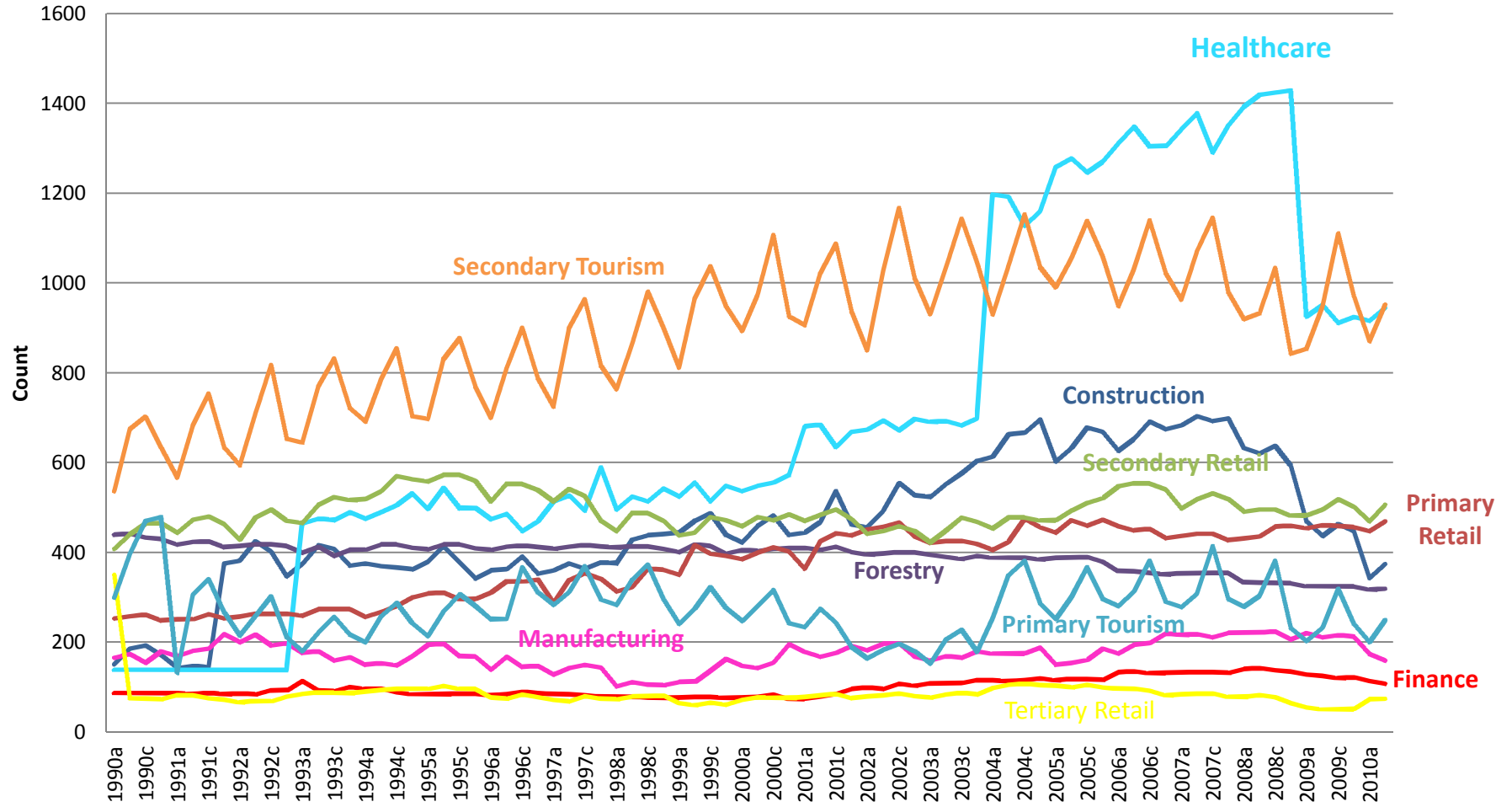


Clallam County Total Quarterly Wages by Sector

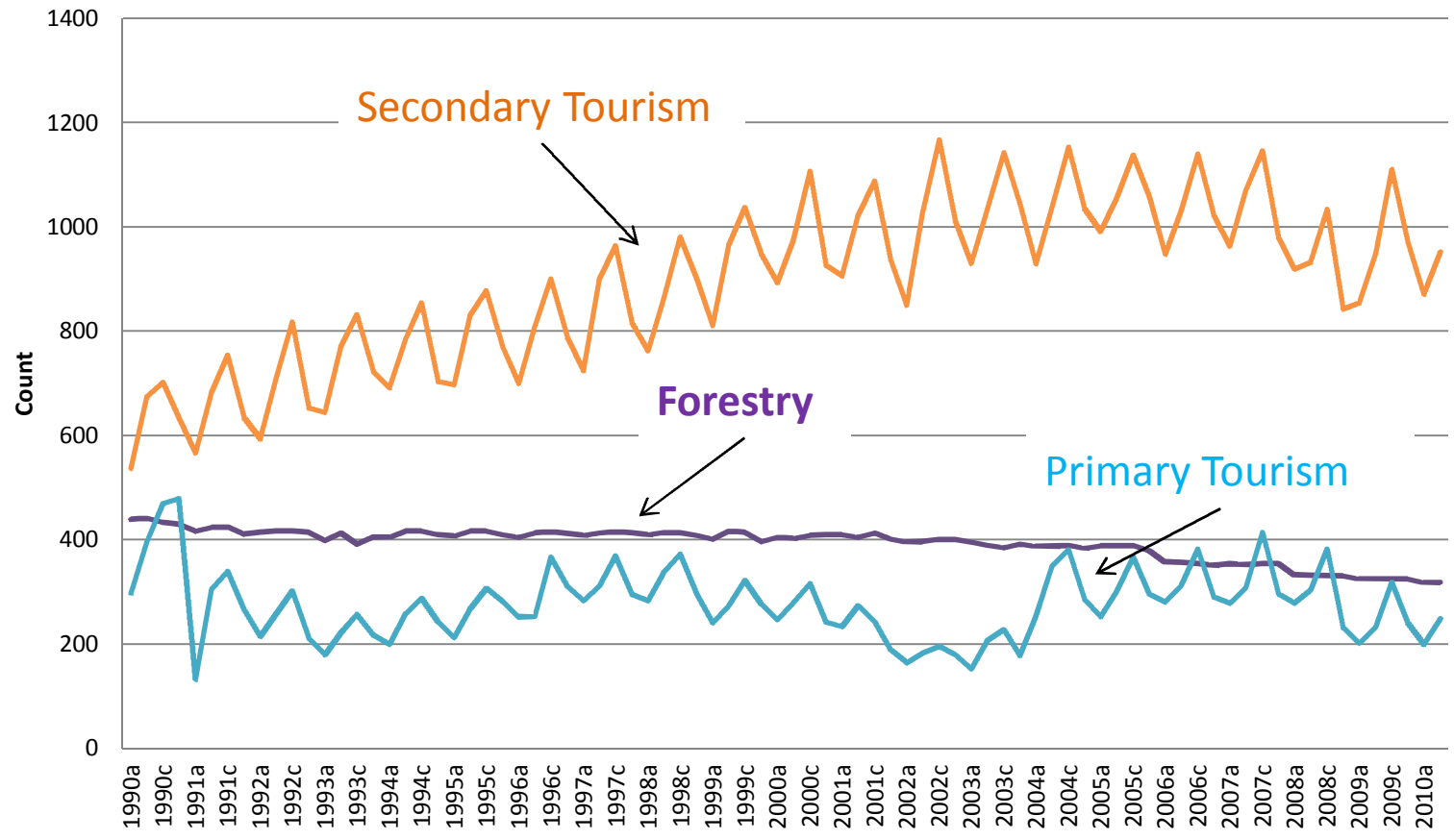


ECONOMIC SECTOR	FIRMS		EMPLOYMENT		WAGES				
	COUN T	PERCEN T	COUN T	PERCEN T	MONTHLY PREMIUM	QUARTERLY	PERCEN T		
Construction	342	14.1%	941	4.3%	\$ 3,041	\$ 285	\$ 8,584,052	4.7%	
Finance	37	1.5%	327	1.5%	\$ 3,090	\$ 342	\$ 3,030,977	1.7%	
Forestry	64	2.6%	1115	5.0%	\$ 4,037	\$ 1,281	\$ 13,503,810	7.4%	
Health	201	8.7%	2456	11.1%	\$ 2,388	\$ (367)	\$ 17,596,781	9.6%	
Manufacturing	27	1.1%	417	1.9%	\$ 3,515	\$ 760	\$ 4,397,540	2.4%	
Retail, R1	48	2.0%	902	4.1%	\$ 2,109	\$ (647)	\$ 5,706,899	3.1%	
Retail, R2	207	8.5%	2115	9.6%	\$ 2,185	\$ (571)	\$ 13,863,612	7.6%	
Retail, R3	35	1.4%	374	1.7%	\$ 2,624	\$ 171	\$ 2,943,788	1.6%	
Toursim, T1	57	2.4%	452	2.0%	\$ 1,126	\$ (1,629)	\$ 1,527,251	0.8%	
Tourism, T2	682	28.1%	1902	8.6%	\$ 1,232	\$ (1,524)	\$ 7,028,846	3.9%	
SUBTOTAL	1700	70.4%	11001	49.8%		\$	78,183,556	42.8%	
COUNTY	2424	100.0%	22104	100.0%	\$ 2,756	\$	182,817,894	100.0%	

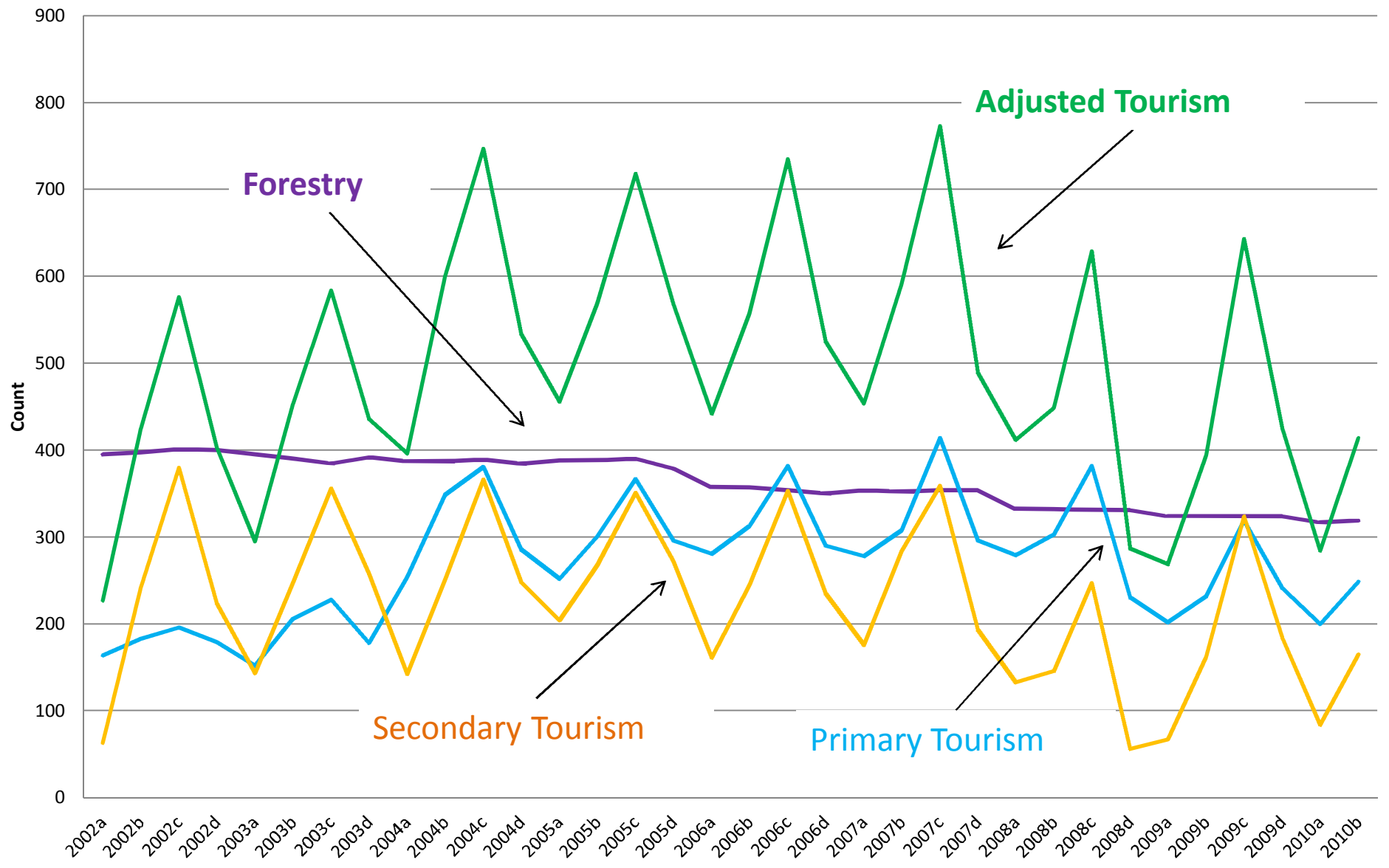
Jefferson County Employment by Sector



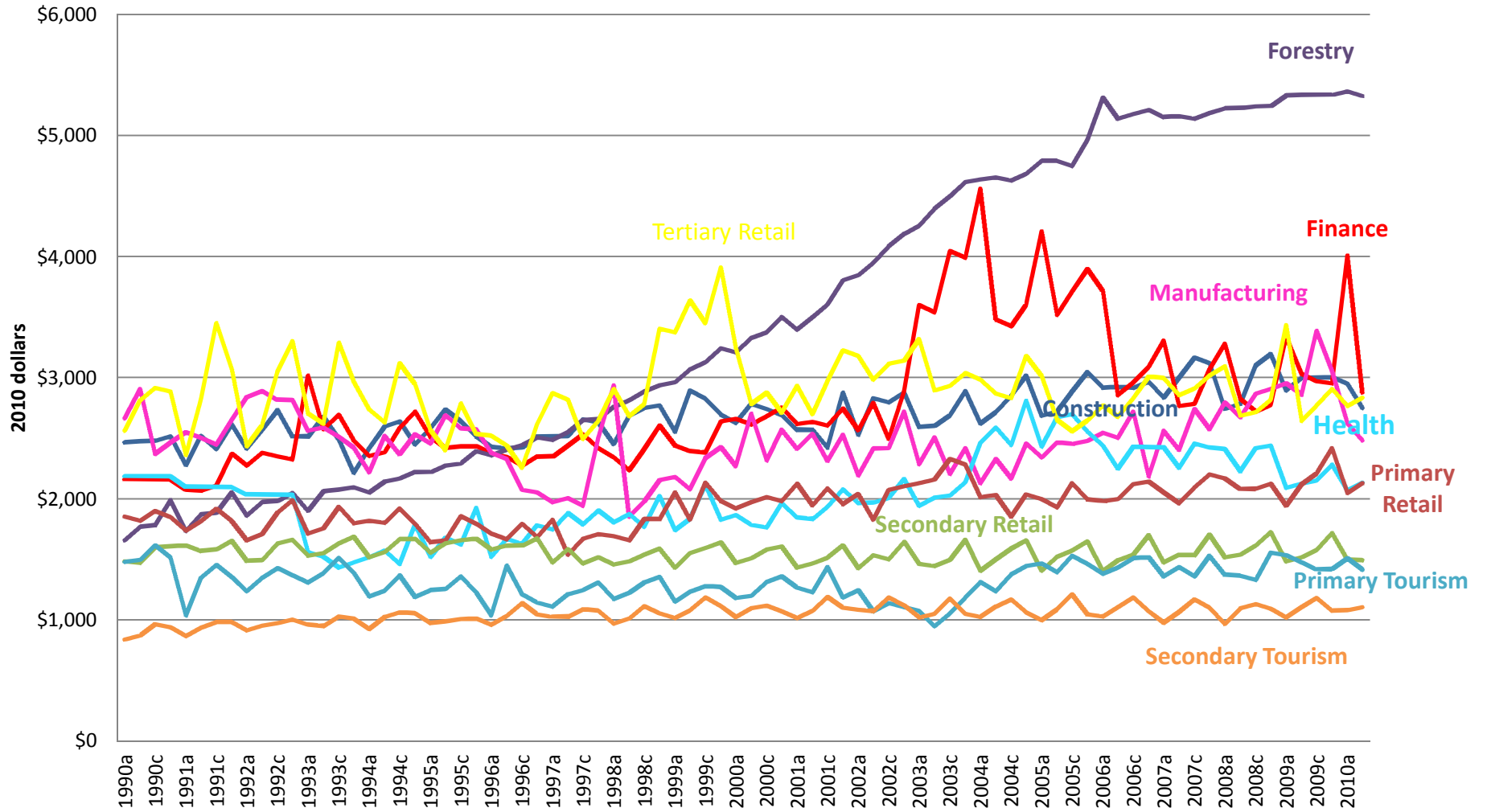
Jefferson County Employment by Sector



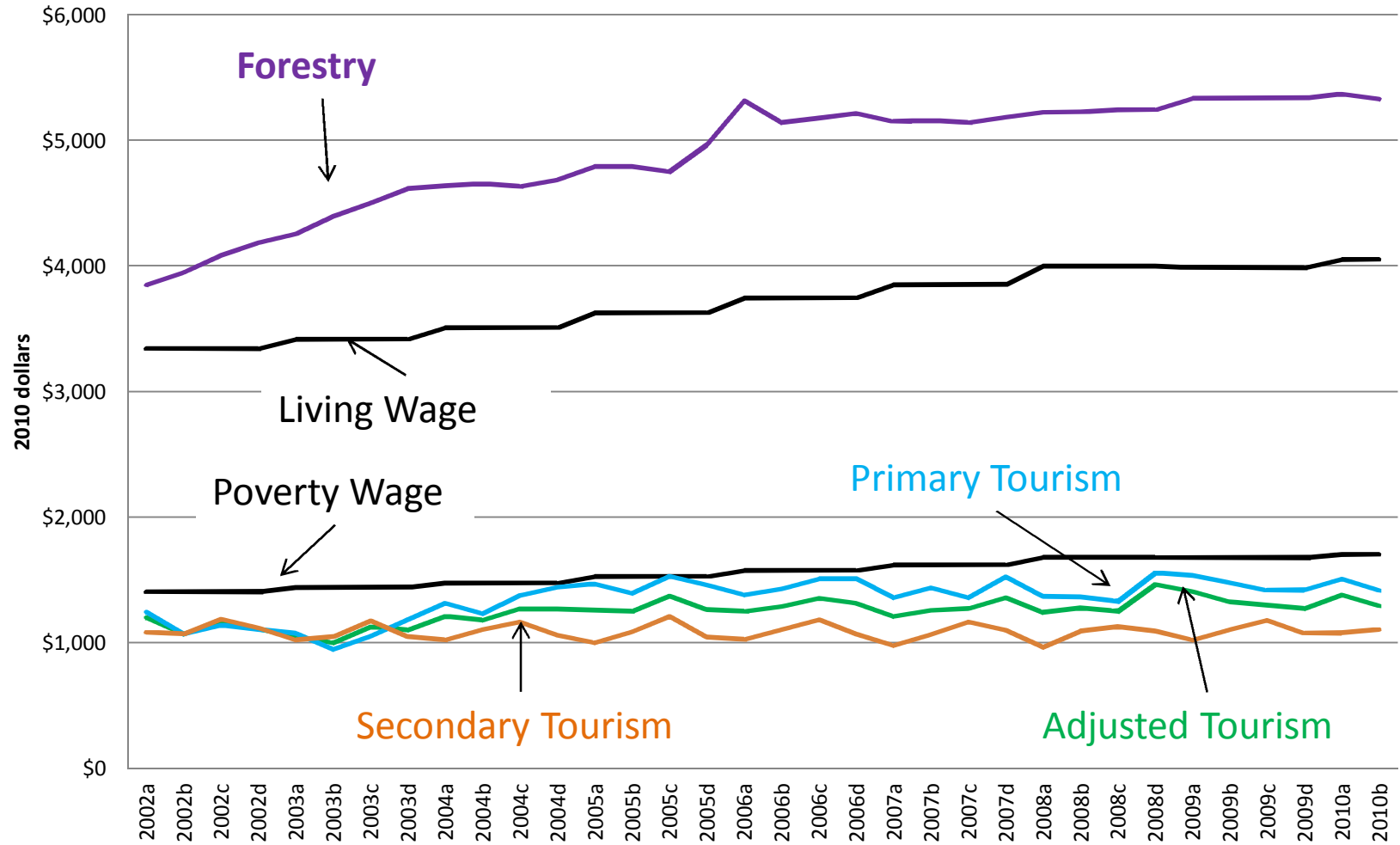
Jefferson County Employment by Sector



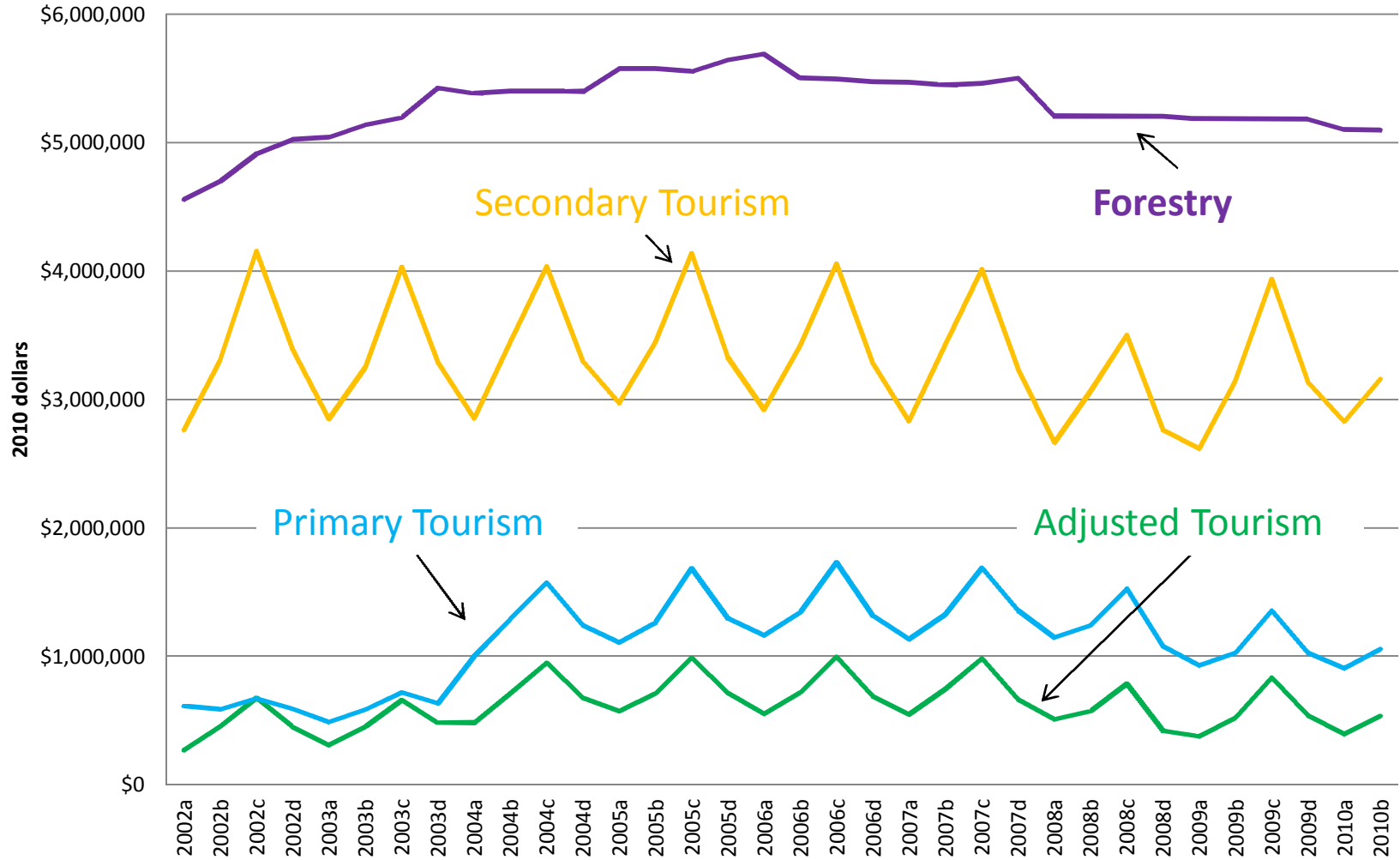
Jefferson County Average Monthly Wages



Jefferson County Average Monthly Wages



Jefferson County Total Quarterly Wages by Sector



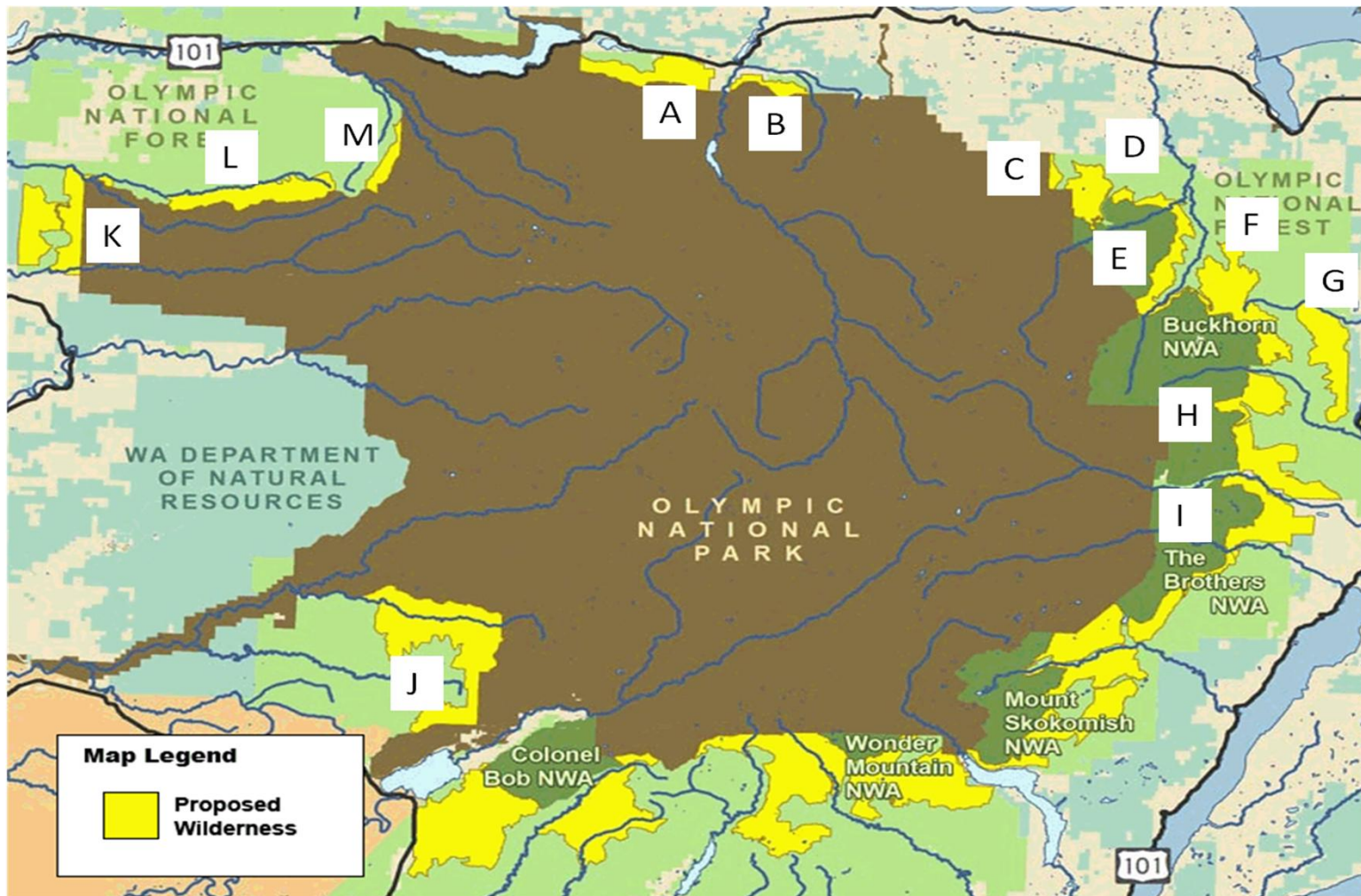
ECONOMIC SECTOR	FIRMS		EMPLOYMENT		WAGES			
	COUN T	PERCEN T	COUNT	PERCEN T	MONTHLY	PREMIU M	QUARTERLY	PERCEN T
Construction	130	12.5%	343	4.4%	\$ 2,954	\$ 353	\$ 3,036,866	5.0%
Finance	10	1.0%	113	1.5%	\$ 4,008	\$ 1,410	\$ 1,358,868	2.2%
Forestry	10	1.0%	317	4.1%	\$ 5,367	\$ 2,768	\$ 5,104,241	8.4%
Health	77	7.4%	916	11.8%	\$ 2,069	\$ (530)	\$ 5,685,051	9.4%
Manufacturing	28	2.7%	173	2.2%	\$ 2,622	\$ 24	\$ 1,361,021	2.2%
Retail, R1	24	2.3%	448	5.8%	\$ 2,047	\$ (551)	\$ 2,751,821	4.5%
Retail, R2	102	9.8%	469	6.0%	\$ 1,496	\$ (1,130)	\$ 2,104,971	3.5%
Retail, R3	12	1.2%	73	0.9%	\$ 2,769	\$ 171	\$ 606,516	1.0%
Toursim, T1	27	2.6%	200	2.6%	\$ 1,511	\$ (1,088)	\$ 906,656	1.5%
Tourism, T2	109	10.5%	871	11.2%	\$ 1,082	\$ (1,517)	\$ 2,826,458	4.7%
SUBTOTAL	529	51.0%	3923	50.5%	\$ 25,925		\$ 25,742,469	42.4%
COUNTY	1054	100.0%	8204	100.0%	\$ 2,618		\$ 64,440,417	100.0%

Overview

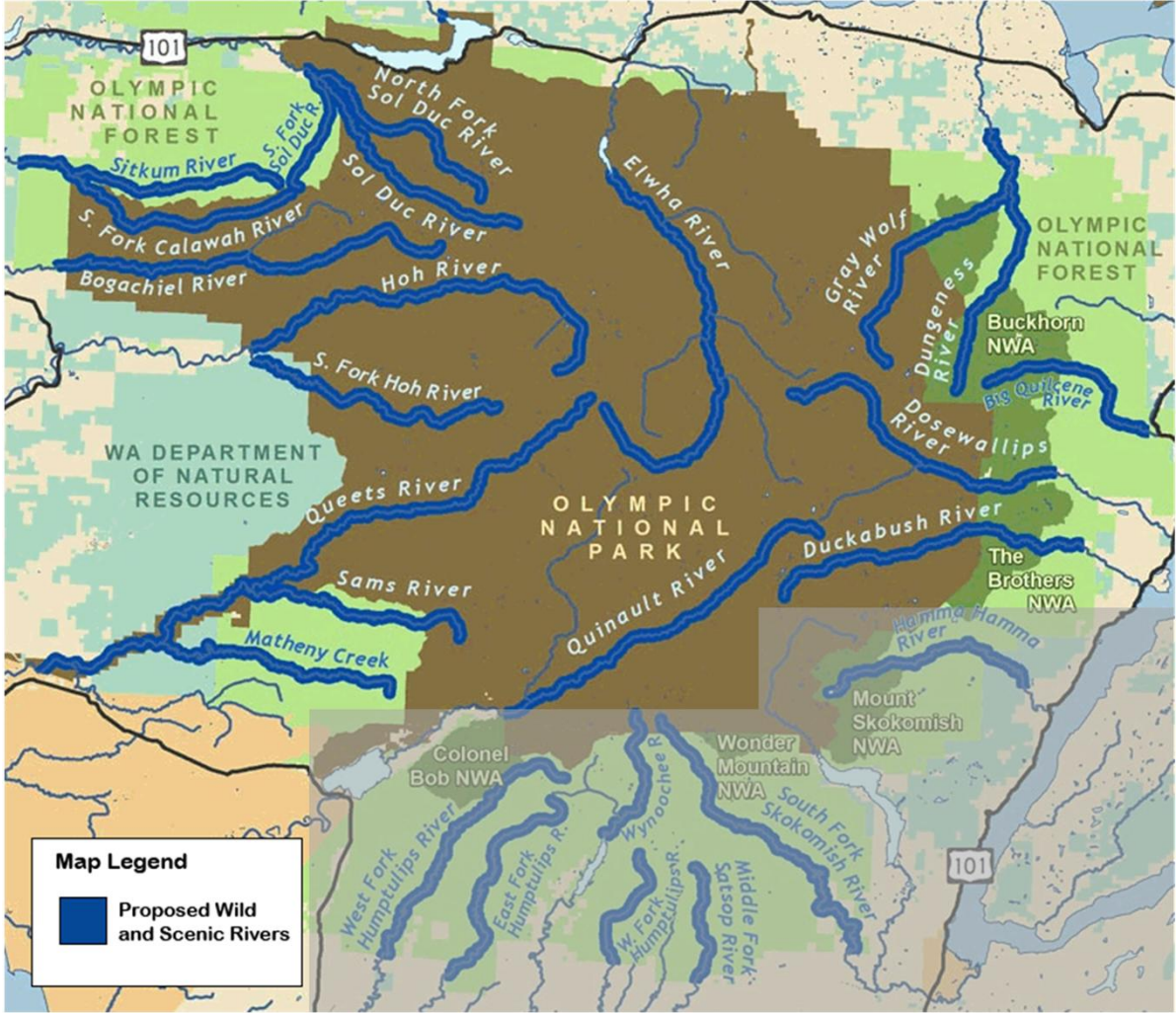
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Acres Reserved by Wilderness

BLOCK	A	B	C	D	E	F	G	H	I	J	K	L	M	TOTAL
ACRES	4,200	1,200	600	2,400	3,600	6,600	4,600	7,600	7,400	14,600	7,400	6,000	1,200	67,400

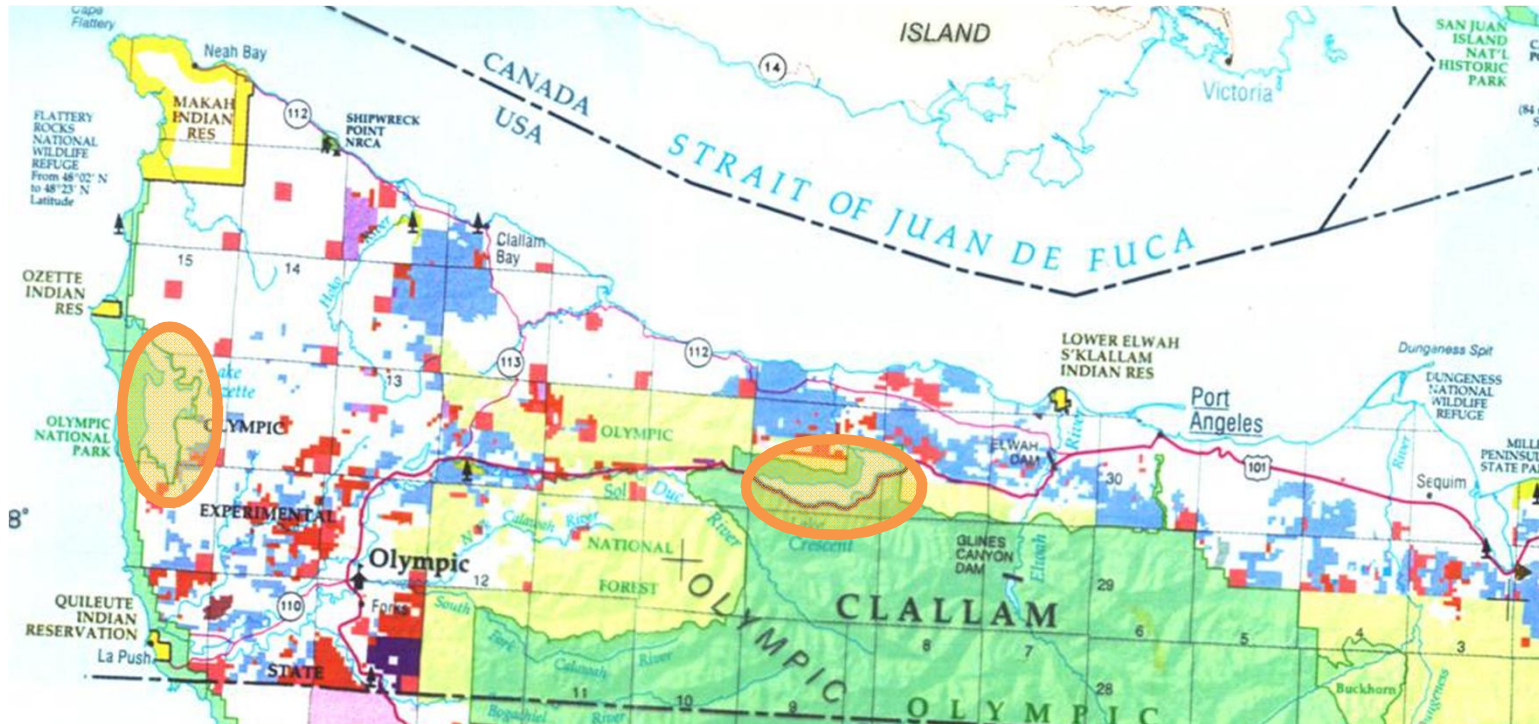


Acres Reserved by Wild & Scenic River



RIVER	ONP MILES	NWA MILES	ONF		DNR	
			MILES	ACRES	MILES	ACRES
Duckabush	12.0	4.0	2.5	557.5	0.0	0.0
Dosewallips	13.5	4.5	0.0	0.0	0.0	0.0
Big Quilcene	0.0	4.5	7.0	1,561.0	0.0	0.0
Dungeness	0.0	8.0	7.5	1,672.5	2.0	542.0
GrayWolf	8.5	6.5	0.0	0.0	0.0	0.0
Elwha	26.0	0.0	0.0	0.0	0.0	0.0
NF Sol Duc	14.0	0.0	0.0	0.0	0.0	0.0
Sol Duc	15.0	0.0	0.0	0.0	0.0	0.0
SF Sol Duc	0.0	0.0	7.0	1,561.0	0.0	0.0
Sitkum	0.0	0.0	15.5	3,456.5	0.0	0.0
SF Calawah	14.0	0.0	0.0	0.0	0.0	0.0
Bogachiel	23.5	0.0	1.0	223.0	0.0	0.0
Hoh	25.0	0.0	0.0	0.0	0.0	0.0
SF Hoh	12.5	0.0	0.0	0.0	4.0	1,084.0
Queets	41.5	0.0	0.0	0.0	0.0	0.0
Sams	6.5	0.0	7.5	1,672.5	0.0	0.0
Matheny	1.0	0.0	11.0	2,453.0	3.5	948.5
Quinault	22.5	0.0	0.0	0.0	0.0	0.0
TOTAL	235.5	27.5	59.0	13,157.0	9.5	2,574.5

Acres Reserved by Sale to Olympic National Park



UNIT	FEDERAL	STATE	PRIVATE	OTHER	TOTAL
Lake Crescent	90	690	829	0	1,609
Lake Ozette	0	2,405	9,905	409	12,719
Queets Corridor	2,008	710	2,810	0	5,528
TOTAL	2,098	3,805	13,544	409	19,856



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Economic Impacts of Proposal Components:

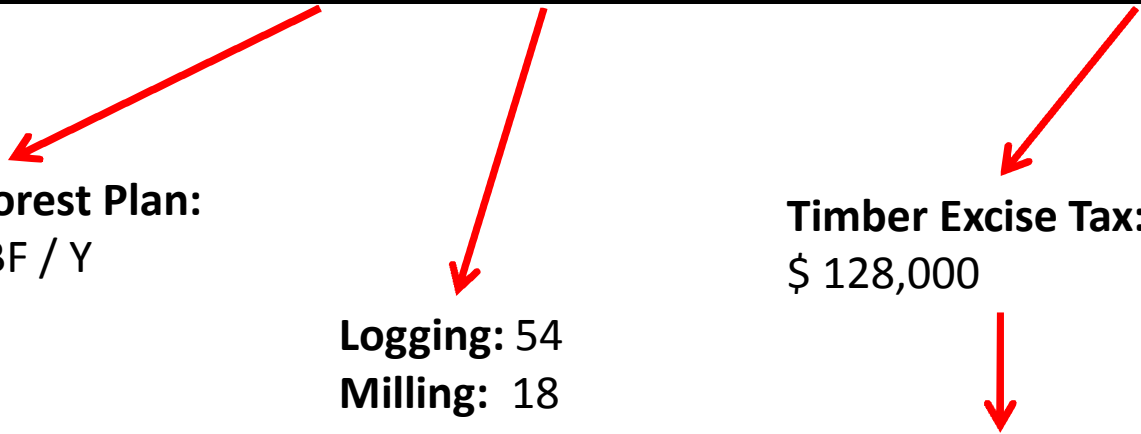
PROPOSAL COMPONENT	ACRES	MBF/Y RESERVED	JOBS	WAGES	TAXES	REPLACEMENT PREMIUM
Wilderness	67400	750	5	\$ 280,229	\$ 69,593	\$ 37,496
USFS Rivers	13159	146	1	\$ 54,711	\$ 13,587	\$ 7,321
DNR Rivers	2579	1574	11	\$ 588,282	\$ 20,151	\$ 78,715
ONP Crescent	1609	759	5	\$ 283,797	\$ 9,988	\$ 37,973
ONP Ozette	12719	5198	37	\$ 1,942,489	\$ 66,538	\$ 259,914
ONP Queets	5528	1562	11	\$ 583,656	\$ 25,954	\$ 78,096
TOTAL	102994	9990	72	\$ 3,733,164	\$ 205,811	\$ 499,515

Olympic Forest Plan:
16,131 MBF / Y

Logging: 54
Milling: 18

Timber Excise Tax:
\$ 128,000

Federal Remittance:
\$ 78,000



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Perceptions of Forest Sector

- Olympic Peninsula is currently unable to meet fiber demand.
- Expansion of Olympic National Park is perceived as having most adverse impact on future fiber supply.
- Marginal impacts are important: Impacts are not linear and continuous.
- Replacement costs may prohibit replacement.
- Proposals have an adverse impact on production, wage, and investment decisions.