



FORESTS, PARKS & RECREATION
VERMONT



AGENCY OF NATURAL RESOURCES

VERMONT FOREST FUTURE STRATEGIC ROADMAP



WELCOME



Photo: Erica Housekeeper, VSJF

VERMONT FOREST FUTURE STRATEGIC ROADMAP: to STRENGTHEN, MODERNIZE, PROMOTE, and PROTECT the forest products sub-sector and the greater forest economy



Photo: Erica Housekeeper, VSJF

WHY FORESTS and FOREST PRODUCTS



Photos Erica Housekeeper, VSJF

This should be THEIR time



Photos Erica Housekeeper, VSJF

Workforce



Photo: Erica Housekeeper, VSJF

Costs



Photo: Erica Housekeeper, VSJF

Changing Landowners



Photo: Erica Housekeeper, VSJF

Losing Forests



Photo: Erica Housekeeper, VSJF

Misunderstanding of Forest Management



Photo: Erica Housekeeper, VSJF

Regulations



Photo: Erica Housekeeper, VSJF

Loosing Instate Capacity to Process Wood



Photo: Erica Housekeeper, VSJF

We Have An Opportunity



VERMONT FOREST SECTOR SYSTEMS ANALYSIS
Exploring New Market Opportunities Across Value Chains



YELLOW WOOD
associates, inc.

JANUARY, 2016



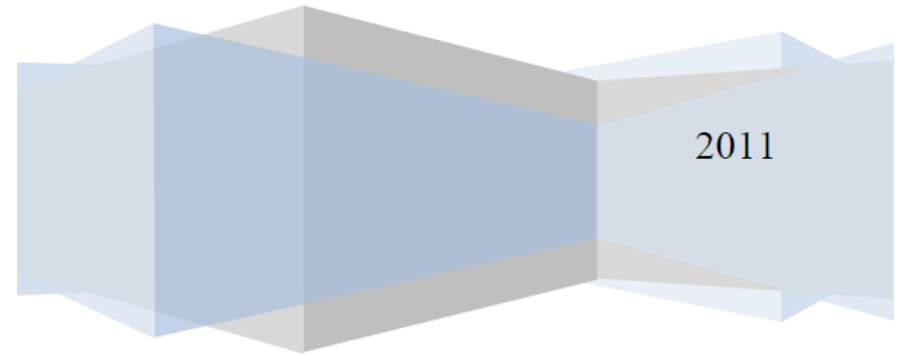
Vermont Forest Products Council

Blueprint for Action

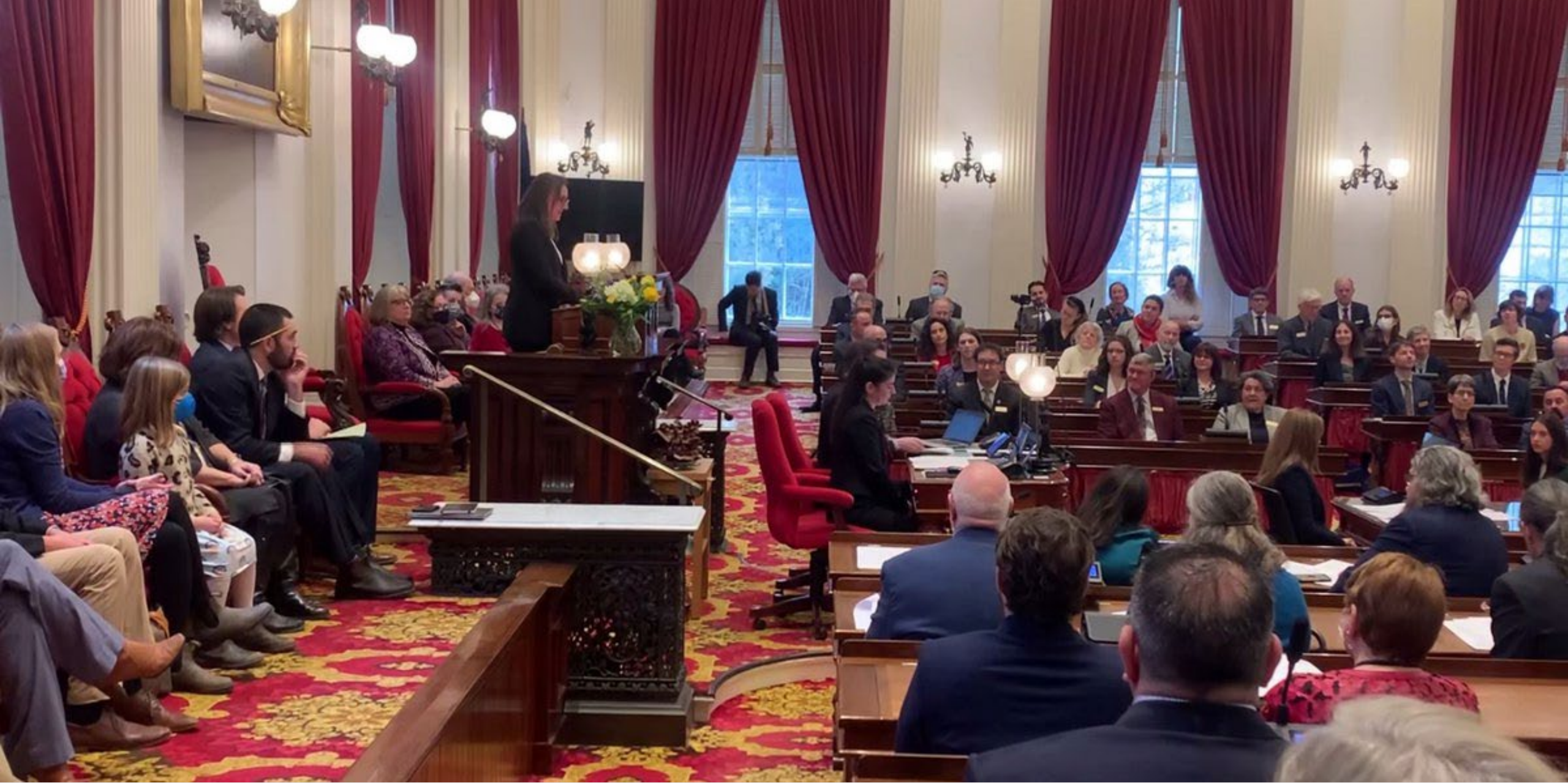
Dossenbach Associates, Inc.

**Vermont Wood Products Sector
Strategic Plan Update**

Prepared for
The Vermont Wood Products Marketing Council



You May Hear We've Been Here Before



This One is Different!



Photo: Erica Housekeeper, VSJF

The Future

**Planning & Engagement
Process**

Now

Final Report

January 2024



**Draft
Recommendations**

July 2023

Our Timeline



Our Planning Process



Our Advisory Panel and Engagement Process:

Roundtables, Surveys, Think Tank, Community Input, State Agencies, Focus Groups, Outreach

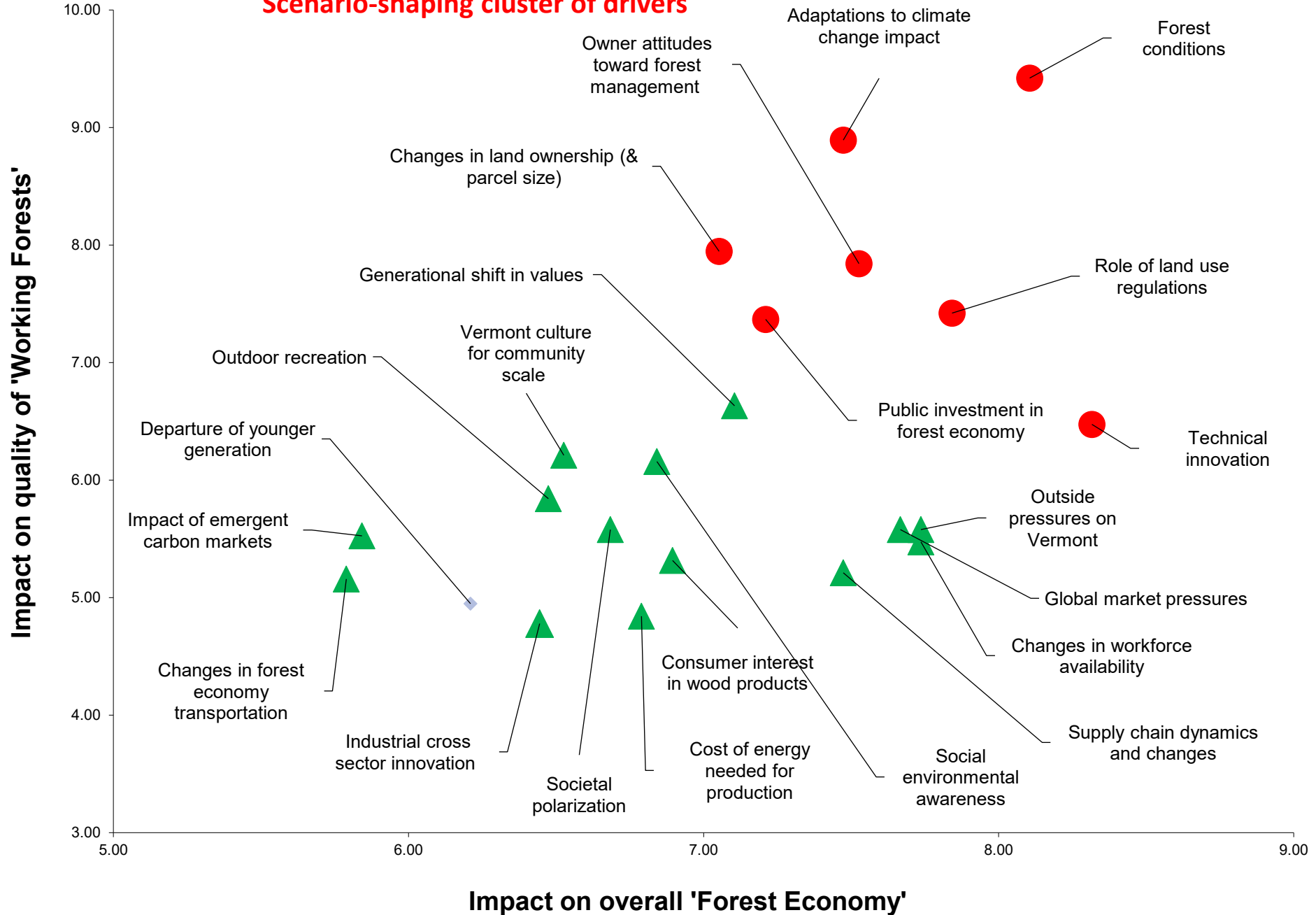
Key Drivers



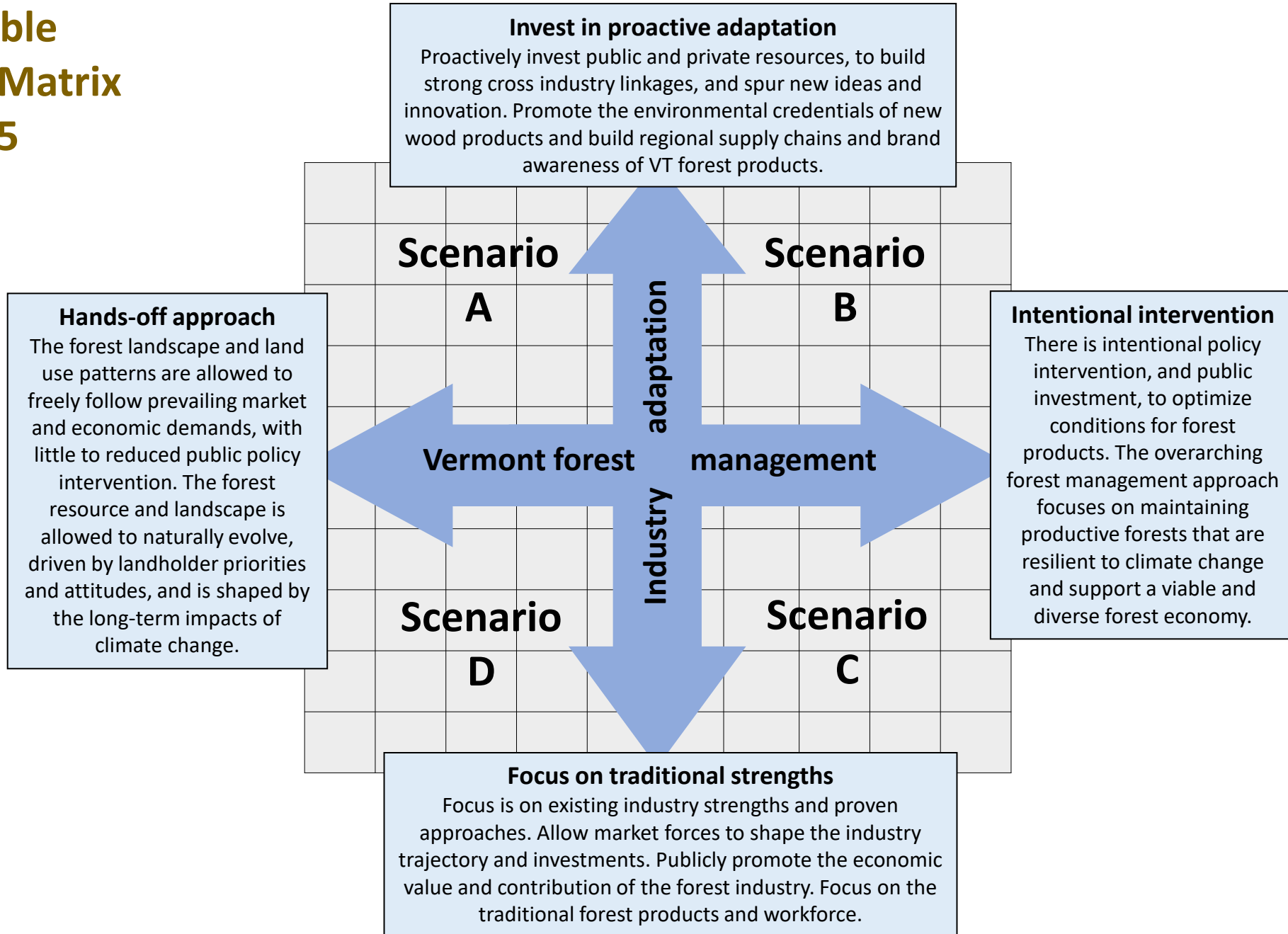
- Forest conditions
- Adaptations to climate change's impact
- Role of land use regulations
- Consumer interest in wood products
- Changes in workforce availability
- Generational shift in values
- Changes in land ownership (& parcel size)
- Cost of energy needed for production
- Owner attitudes toward forest management
- Outside pressures on Vermont
- Supply chain dynamics and changes
- Changes in forest economy transportation
- Public investment in the forest economy
- Impact of emergent carbon markets
- Vermont culture for community scale
- Societal polarization
- Industrial cross-sector innovation
- Departure of younger generation from Vermont
- Technical innovation
- Global market pressures
- Outdoor recreation

VERMONT FOREST MANAGEMENT

Scenario-shaping cluster of drivers



Plausible Scenario Matrix 2035





Photos: Erica Housekeeper, VSJF

The People Involved



Photos: Erica Housekeeper, VSJF

The Collective Us



Photos: Erica Housekeeper, VSJF

Opportunity for Future Forest

**What would be different 10
years from now if we are
successful?**



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