



SCENARIOS OF THE FUTURE: SUMMARY SNAPSHOT

VERMONT FOREST FUTURE STRATEGIC ROADMAP

SCENARIO A This scenario forecasts a future that is shaped by a combination of increased investment in industry adaptation, and a more 'hands-off' approach to the management of the Vermont forest resources.

SCENARIO SNAPSHOT – FUTURE IMPLICATIONS

- **Innovation is boosted**, especially for entrepreneurial forest product operations, who can create new niche products.
- **Forest landscape becomes more fragmented**, as different competing land-uses break down the contiguity of the forest resource.
- **Forest quality degrades**, as there is less management for forest health, and ecological shifts are accelerated by climate change.
- **Larger forest products enterprises struggle**, due to lack of secure supply of quality timber.

SCENARIO B This scenario forecasts a future where intentional forest management is coupled with proactive industry adaptation – helping drive innovation and vibrancy in the forest economy.

SCENARIO SNAPSHOT – FUTURE IMPLICATIONS

- **Investment in innovation increases**, and public and private capital is deployed in innovation, technology, and marketing.
- **Forest management and health increase**, as greater policy intervention works to protect 'forests as forests' and help climate mitigation.
- **Skilled workforce demand rises**, as forest management and production become more technologically based.
- **The industry changes rapidly**, with a greater focus on regional supply chains, innovation networks, and new products.

SCENARIO D This scenario forecasts a future where a 'hands-off' forest management approach is coupled with a focus on traditional industry strengths. This creates a disjointed future, where the supply of timber is increasingly challenged, and the industry struggles to remain competitive.

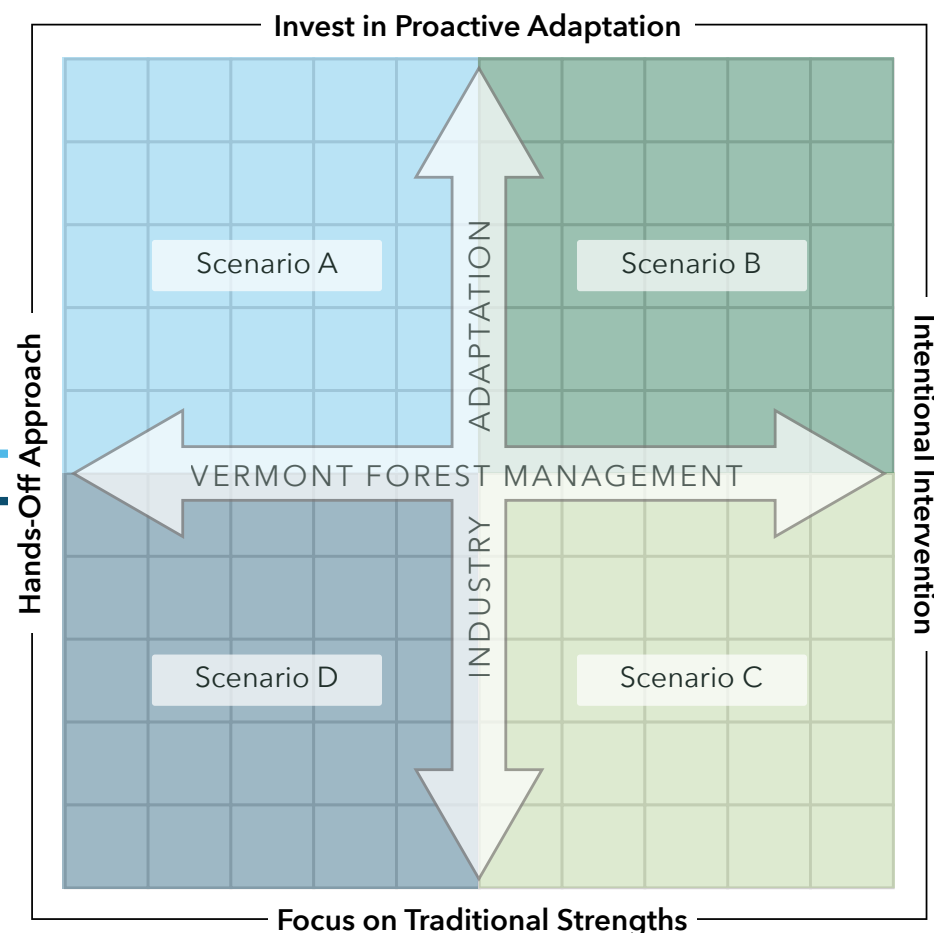
SCENARIO SNAPSHOT – FUTURE IMPLICATIONS

- **Land user conflicts increase**, as there is increasing competition for a range of uses of the forest landscape, such as development, recreation, and conservation.
- **Forest economy declines**, as the major forest products sector declines, which negatively impacts rural communities.
- **Forest quality and health declines**, as there is less management for forest health, and ecological shifts are accelerated by climate change.
- **Forest fragmentation accelerates**, as different competing land-uses break down the contiguity of the forest resource, and result in more uncontrolled developments.

SCENARIO C This scenario forecasts a future where intentional forest management is coupled with focusing on industries traditional strengths – helping secure supply of timber for large scale wood processors.

SCENARIO SNAPSHOT – FUTURE IMPLICATIONS

- **Traditional approaches prevail**, as the industry doubles down on proven approaches and historic strengths.
- **Industry promotion focuses on value**, with an emphasis on economic scale and contribution, and number of jobs.
- **Forest timber quality improves**, as forest management focuses on protecting the forest products sector and ensuring long-term supply of timber.
- **Industry declines in face of competition**, as other regions invest in innovation and adaption, which delivers them greater profitability and societal support.



UPDATED JUNE 2023

future*iq*
Create Future Intelligence
www.future-iq.com

VERMONT FOREST FUTURE STRATEGIC ROADMAP

ABOUT THE PROJECT

The goal of the Vermont Forest Future Strategic Roadmap project is to evaluate the current state of Vermont's forest economy and to identify the opportunities to strengthen, modernize, promote, and protect the forest economy into the future.

The Vermont Forest Future Strategic Roadmap will build on previous efforts to provide actionable strategies and practical recommendations for the development and support of a thriving, modern, and strong forest products sector and the broader forest economy. This will continue to be a significant source of economic activity in Vermont and provide economic incentives for forest landowners to maintain intact forest land and practice sound forest management.

The Vermont Forest Future Strategic Roadmap is being developed from extensive public stakeholder input and an advisory panel of stakeholder representatives. It will be a living document, reviewed periodically and updated at least every ten years.



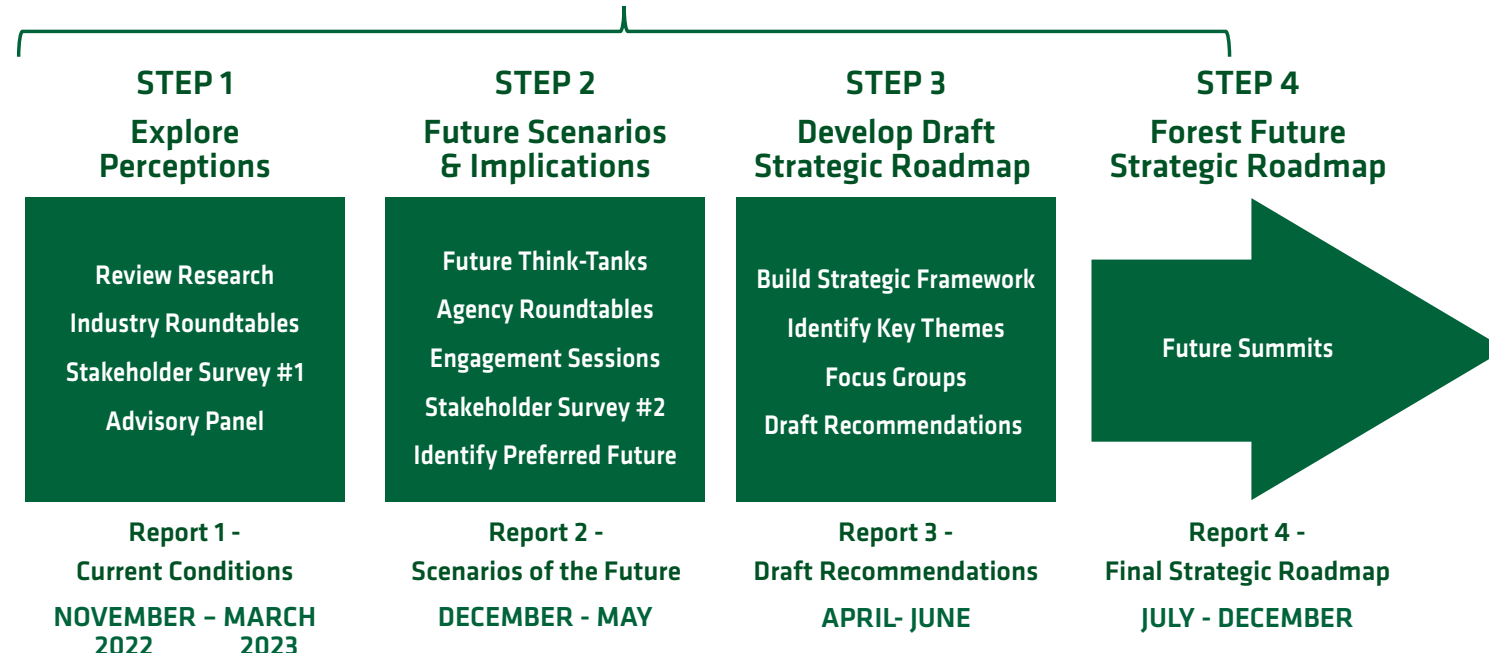
THE NEED FOR THE VERMONT FOREST FUTURE STRATEGIC ROADMAP

Vermont's forest economy provides more than 13,000 jobs, more than \$2 billion in direct economic output, and supports the growing outdoor recreational and tourism sectors.

The relationship between the forest economy and Vermont's forest landscape is a balancing act of benefits and costs. Vermont's forest economy relies on access to forestlands, while forest landowners rely on the support and benefits of a vibrant forest economy to maintain intact forestland.

Vermont is losing thousands of acres of forestland to non-forest uses each year, destabilizing the forest economy and threatening Vermont's forested working landscape. A revitalization of the forest economy has been identified as a primary strategy for keeping forests forested for the many values and benefits forests provide while supporting Vermonters engaged in the working forest landscape – from landowners to sawmills.

VERMONT FOREST FUTURE STRATEGIC ROADMAP PROCESS



Act 183 initiated the Vermont Forest Future Strategic Roadmap project, and the legislature provided the following reasons for doing so:

- Forestlands are of statewide importance; contribute to the protection and conservation of wildlife habitat, air, water, and soil resources; mitigate the effects of climate change; benefit the general health and welfare of Vermonters.
- The forest products sector manufactures products that are used and enjoyed by Vermonters.
- Private forestlands represent 80% of Vermont's forestlands; 56% of private forestlands are enrolled in the forestland category of Vermont's Use Value Appraisal Program (UVA) and are managed as primarily working forests supporting the forest-based rural economy.
- Forestry operations support Vermont's intact forests that benefit Vermont's economy and all Vermonters.



For more
information,
contact:

Danielle Fitzko

Interim Commissioner
Vermont FPR
802-598-9992

Danielle.Fitzko@vermont.gov

David Beurle

Chief Executive Officer
Future iQ
612-757-9190

david@future-iq.com



UPDATED JUNE 2023

future→iQ
Create Future Intelligence
www.future-iq.com