Focus Report series - Hot topics in global forest industries

The US South softwood industry

Outlook for the world's most important softwood fiber basket

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WOOD RESOURCES INTERNATIONAL

O'Kelly Acumen

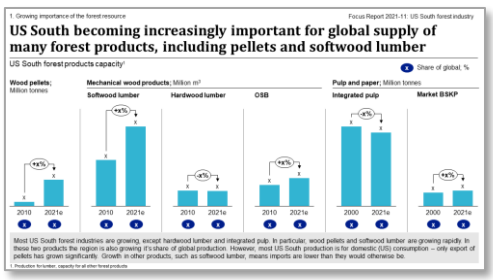
The US South is becoming an increasingly important softwood fiber basket globally, with large potential to expand supply of roundwood and forest products – including lumber, pellets, and softwood market pulp. This study establishes a fact base around the forest resources and industry in the region, provides a view on the likely development of future wood supply and forest industry expansion, and the impact that could have on global markets. It also considers the implications for US South industry, including pricing of stumpage and roundwood.

Contents

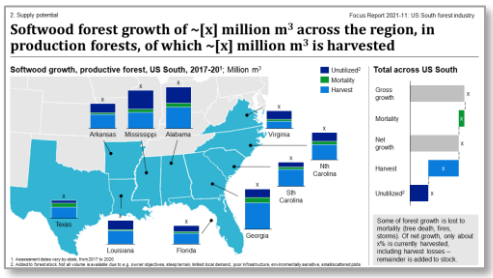
1. **Growing importance of the US South**
   - Forest resource profile (area, species, location, ownership)
   - Softwood area, yield, and harvest rate versus other regions
   - Share of global softwood resource and forest products
2. **Forest supply potential**
   - Softwood growth, removals and stock, historical and outlook
   - Supply fundamentals; forest area, yield utilization, waste
   - Potential for increased supply and barriers to overcome
3. **Raw material market and prices**
   - Softwood supply by grade over time
   - Softwood roundwood supply chain costs
   - Historical prices (softwood sawlogs, pulplogs, chips)
   - Analysis of average price and variability vs. other regions
4. **Forest industry and competitiveness**
   - Softwood fiber supply/demand by grade and industry
   - Lumber industry size, growth, locations, global cost position
   - Pellet industry size, growth, locations, global cost position
   - Pulp industry size, growth, locations, global cost position
5. **Potential role on global markets**
   - Potential role on log and chip markets
   - Potential role on lumber markets
   - Potential role on pellet markets
   - Potential role on market pulp and paper markets
6. **Conclusions and implications**
   - Expected development of US South forest industry
   - Likely impact on global markets
   - Implications for US South (e.g., prices, returns, technology)

Example exhibits

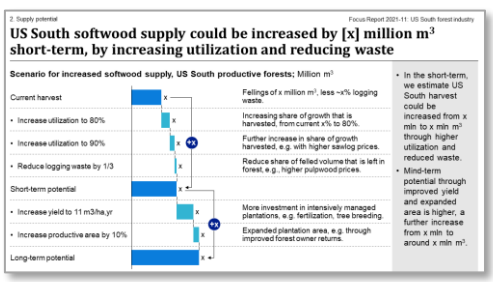
US South share of global forest product capacity in 2010 and 2021e.



Forest growth and fellings by state in the US South in 2017-20.



Estimated potential to increase roundwood supply in US South.



Questions the report helps answer

- What is the current status of the US South softwood resource and forest industries?
- How much wood could US South forests supply – and would would be required to achieve that?
- What is the cost of US South forest industries?
- How could expansion of US South industry impact on North American and global markets?
- How is the US South forest industry likely to evolve in the next 5-10 years?
- What are the implications for US South forest owners, industry and investors?

Who the report is most relevant for

- US South **lumber**, **pellet** and **pulp producers**.
- US South **forest owners**.
- **Timberland investors** globally.
- **Global manufacturers** of lumber, pellets and pulp.
- **Importers** of US South raw materials and products.
- **Exporters** from competing forestry regions
- **Forest industry machinery suppliers**, from logging equipment to pulp and paper mills.
- **Analysts**, **consultants**, **financial institutions** and **industry associations**.

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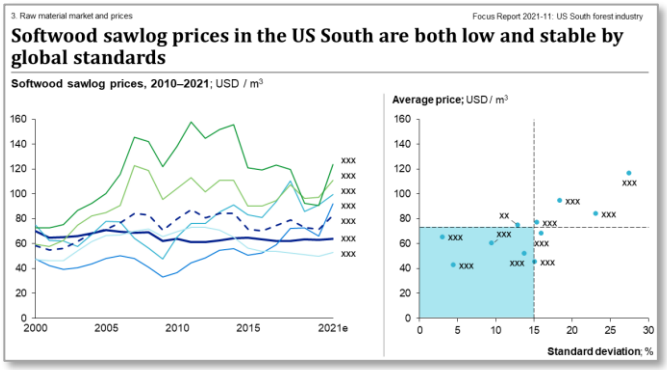
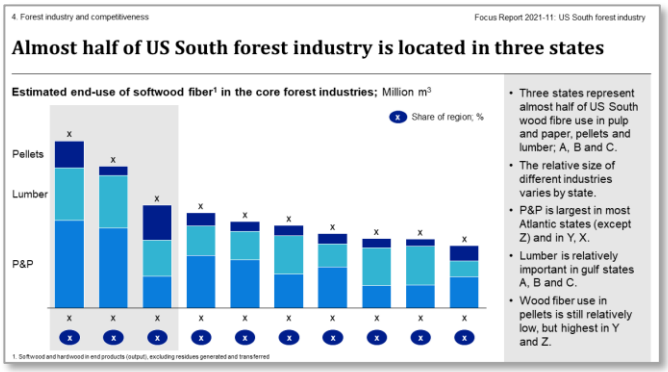
Example exhibits

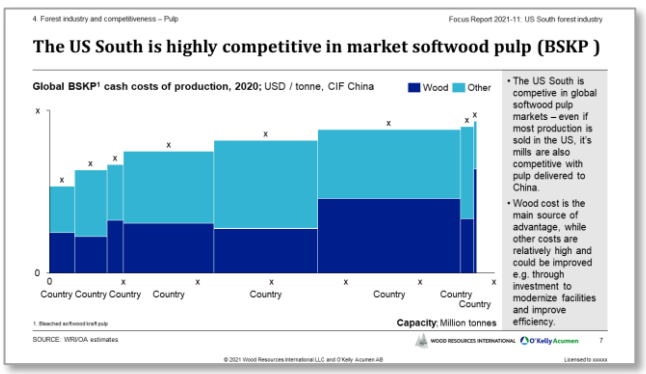
Softwood log prices in US South and other regions.



US South wood fiber demand by state and industry.



US South pulp cost position globally (BSKP).



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