

# Global softwood roundwood supply

## Region 1: North America

Outlook to 2035

April 2026



The first in a three-part series analysing global softwood roundwood supply and pricing, this report provides a detailed assessment of North America – covering forest area, growth, mortality, harvest intensity, supply chain costs, and log prices. All packages also include an integrated global overview (to be released June 2026), with supply forecasts by region to 2035 and a comparison of regional investment attractiveness for forestry and forest-product industries.

### Contents

#### Region 1: North America

##### Region overview

- Global context and integrated outlook to 2035

##### Three regional chapters:

1. US South
2. US Northwest
3. Canada

##### Each regional chapter contains:

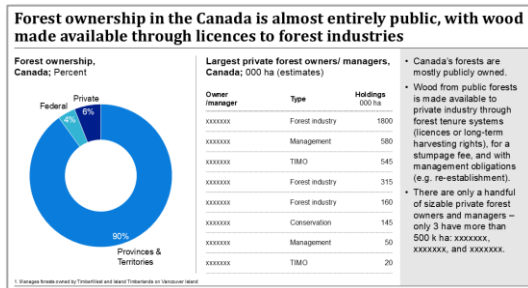
- Forest distribution and softwood productive area
- Forest ownership structure and largest owners
- Analysis of drivers of softwood roundwood supply
- Historical development of area, yield, natural mortality
- Historical development of harvest degree (utilization)
- Softwood roundwood harvests by species and grade
- Supply chain costs and price trends 2000-25
- Perspectives on factors impacting future supply
- 2035 outlook for supply and log pricing

#### + Global overview (out June 2026)

- Global softwood roundwood supply 2000-25
- Softwood forest utilization and plantation area by region
- Supply forecast by region to 2035, and scenarios
- Demand drivers and substitution of softwood
- International trade flows of softwood roundwood
- Price comparison of softwood logs by region and grade
- Regional comparison of attractiveness for investment

### Example exhibits

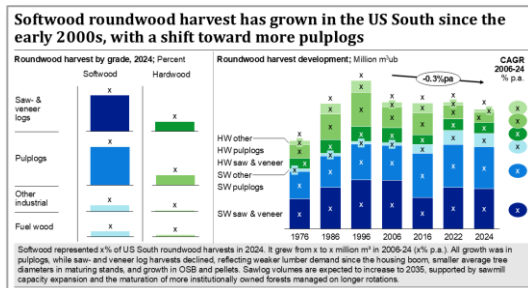
#### Forest ownership structure and largest owners



#### Key drivers of softwood roundwood supply and their trajectory



#### Roundwood supply development by species and grade



## Questions the report helps answer

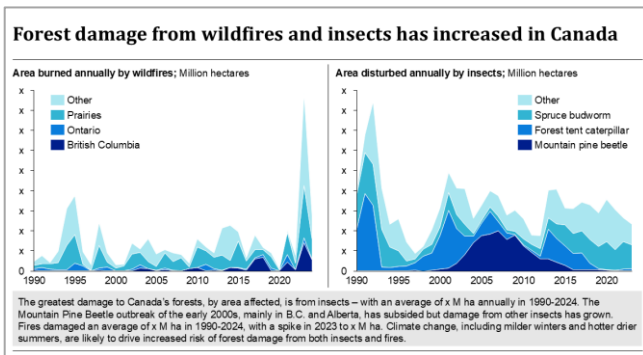
- How much softwood forest is there in North America – and who owns it?
- Where will new softwood supply come from – and what will constrain it?
- Which regions are structurally lower-cost, and why (forestry, logging, haulage)?
- Can US South supply expand enough to meet the continent's needs?
- How will supply and log prices evolve by region in North America to 2035?
- How will global softwood supply evolve to 2035 – what regions have most potential?
- Which regions are most attractive for investment in softwood forestry?
- Which regions are most attractive for investment in softwood industries?

## Who the report is most relevant for

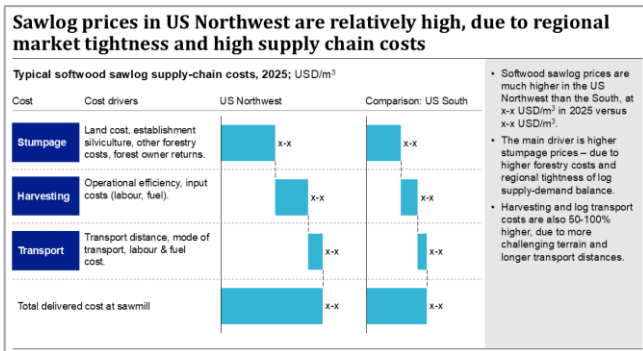
- **Forest owners and investors**
- **Traders** in roundwood and chips
- **Investors** in forest product industries
- **Solid wood product manufacturers**
- **Pulp, paper and panel manufacturers**
- **Pellet and other bioenergy producers**
- **Analysts, consultants, financial institutions and industry associations**
- **Forest certification organizations and sustainability NGOs**

## Example exhibits

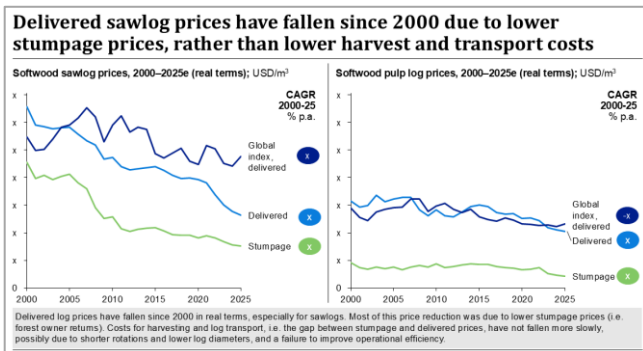
Trends in forest damage (e.g., insects, wildfire)



## Supply chain costs from stump to mill



## Real price development for softwood logs



Go here to order: <https://www.okelly.se/shop/SoftwoodSupplyNA>

## Pricing options

- **Single-user license:** USD 3,000
- **Corporate license:** USD 3,900
- **Data (additional):** USD 600

What you get:

- 55-page report on North America
- 25-page report on Global overview (out Jun.'26)
- Authors available for a 45 min interview

## Contact us for more information

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## Included in all packages



### Global overview – to be released in June 2026

- Global softwood supply, prices, and international trade
- Demand drivers and substitution effects
- Future supply outlook, uncertainties and scenarios
- Comparison of roundwood costs and investment returns

## Select 1, 2 or 3 regions



### 1. North America – out now

- US South
- US Northwest
- Canada



### 2. Europe – out May 2026

- Russia
- Nordics & Baltics
- Central Europe



### 3. LatAm & Asia-Pacific – out June 2026

- Brazil & Chile
- NZ & Australia
- Japan & China

## Regional perspectives

- Overview of forest distribution
- Forest area over time
- Forest growth and removals over time
- Harvests by grade
- Supply chain costs
- Roundwood prices
- Analysis of supply drivers
- Outlook for supply and prices to 2035

## Package options and prices

- 1 region: USD 3,000 single / 3,900 corporate
- 2 regions: + USD 2,250 single / 2,925 corporate (25% discount on 2<sup>nd</sup>)
- 3 regions: + USD 1,500 single / 1,950 corporate (50% discount on 3<sup>rd</sup>)
- Data files: USD 600 per region