

Global softwood roundwood supply

Global overview

Outlook to 2035

June 2026



The last in a four-part series analysing global softwood roundwood supply and pricing, this global overview brings together insights from key softwood supply regions into a high-level global perspective – covering market size and historical trends, demand drivers and substitution, log prices, global trade flows, and constraints shaping future supply. It presents forecasts of softwood roundwood supply by region to 2035 and assesses the implications for market participants.

Contents

1. Introduction and context

- Market size by species and grade 2000-25
- Historical softwood supply by region 2000-25
- Key supply constraints for softwood roundwood globally
- Utilization of softwood forests in Northern Hemisphere
- Softwood plantation area in Southern Hemisphere

2. Demand and substitution

- Global softwood roundwood flows from forest to end use
- Underlying demand drivers 2000-25
- Barriers to substitution in solid wood applications
- Softwood substitution potential in pulp and paper

3. Trade and pricing

- Softwood sawlog and pulplog price by region in 2025
- Log price evolution in 2000-25 by grade and region
- Global softwood log trade flows

4. Forecasts and scenarios

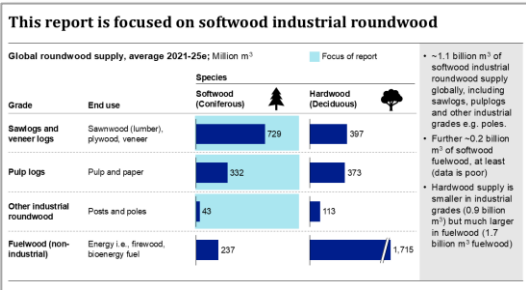
- Global softwood supply in 2000-25 and 2025-35 forecast
- Global softwood supply forecast 2025 vs 2035 by region
- Regional outlook for softwood supply evolution 2025-35
- Global trade balance by region in 2025 and 2035f
- Key uncertainties by region, in supply and demand
- Scenarios (base, high, low) for 2035 softwood supply

5. Implications for industry and investors

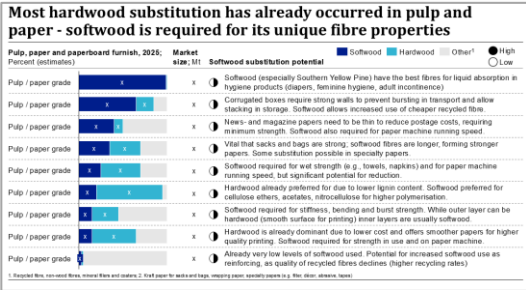
- Risk vs. return by region for timberland investors
- Sawlog costs vs. forecast supply growth by region
- Pulpwood costs vs. forecast supply growth by region
- Key opportunities for softwood market participants

Example exhibits

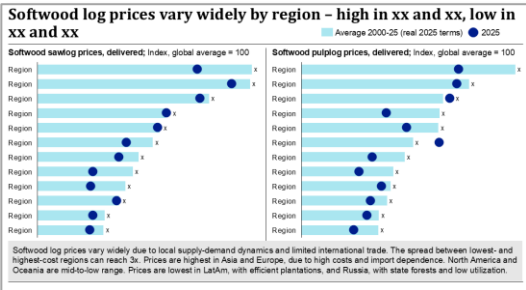
Market size by species and grade



Softwood substitution potential in pulp, paper and paperboard



Softwood sawlog and pulplog prices by region in 2025 and 2000-25 average



Questions the report helps answer

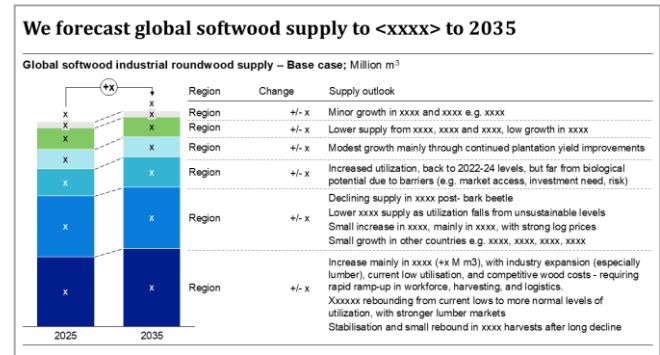
- How much softwood forest is there globally, and how is it distributed?
- What drove global supply growth since 2000, and what will drive it to 2035?
- Where will new softwood supply come from – what constraints could limit it?
- How do softwood log prices and supply costs compare across regions?
- How will global softwood supply, demand and trade evolve to 2035?
- What are the key uncertainties by region?
- Which regions are most attractive for investment in softwood forestry?
- Which regions offer the greatest opportunities for forest product manufacture?

Who the report is most relevant for

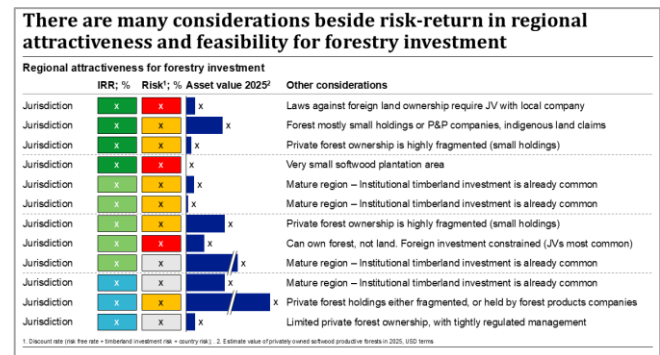
- **Forest owners and investors**
- **Traders** in roundwood and chips
- **Investors** in forest product industries
- **Solid wood product manufacturers**
- **Pulp, paper and panel manufacturers**
- **Pellet and other bioenergy producers**
- **Analysts, consultants, financial institutions and industry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

Example exhibits

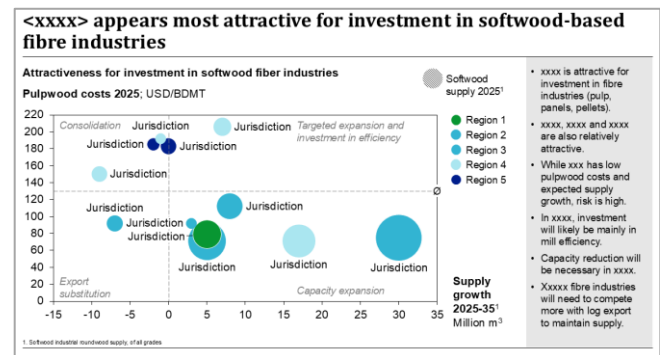
Global softwood roundwood forecast by region



Risk vs. return by region for timberland investors



Wood costs vs. forecast supply growth by region



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Global softwood roundwood supply

Included in all packages



Global overview

- 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

- US South
- US Northwest
- Canada



2. Europe & Russia

- Russia
- Nordics & Baltics
- Central Europe



3. LatAm & APAC

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

Regional perspectives

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

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- 1 region + global overview: USD 3,000 single / 3,900 corporate
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