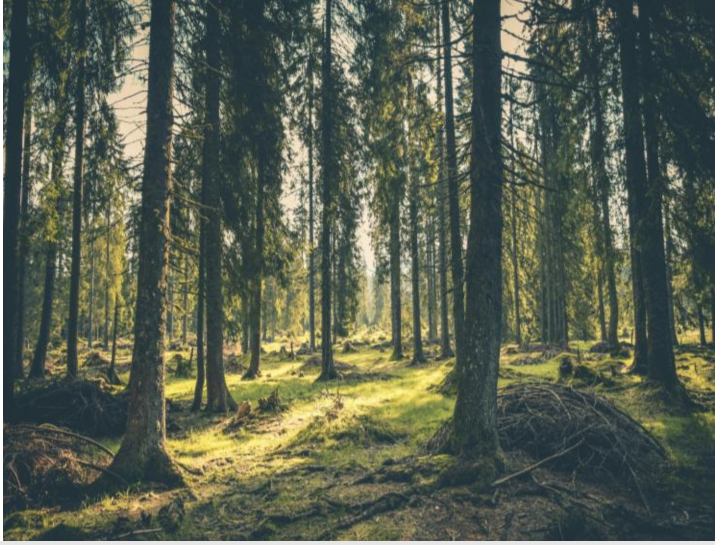
Report series

Global softwood roundwood supply

Outlook to 2035

March-June 2026

O'Kelly Acumen global wood trends



Softwood roundwood supply is increasingly constrained globally, leading to higher prices and growing interest in unlocking new supply. This report series provides a comprehensive overview of current and potential supply worldwide, with deep dives into the main supply regions – through analysis of forest area, growth, utilisation and market factors. It also describes forest ownership, forest investment returns, and the regional implications for forest industries consuming softwood logs and chips.

Global overview

The report includes:

- Global softwood supply by region and grade
- Analysis of supply constraints
- Demand by end use
- Demand drivers by end-use application and substitution
- Main international trade flows
- Supply forecasts to 2035 by region and scenarios
- Analysis of key uncertainties
- Log costs and expected supply growth by region
- Softwood forest investment returns by region
- Implications for market participants

Regional perspectives

Deep dives into regions representing 87% of global softwood roundwood supply

Each regional report contains::

- Overview of forest distribution
- Forest ownership
- Forest area over time
- Forest growth and fellings
- Harvests by grade
- Analysis of supply drivers
- Supply chain costs from stump to mill
- Roundwood supply forecast
- Historical price evolution of sawlogs and pulpwood
- Roundwood price outlook

Reports in the series

Global overview

Integrated global perspective

Softwood supply, demand drivers, trade, supply forecasts, uncertainties and scenarios, regional costs and forest investment returns.

www.okelly.se/shop/softwoodsupplyglobal

Region 1: North America

US South, US Northwest, Canada

Softwood forest area, growth, ownership, damage, harvests, supply-chain costs, price evolution, forecast supply and pricing.

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Region 2: Europe and Russia

Nordics, Baltics, Central Europe, Russia

Softwood forest area, growth, ownership, damage, harvests, supply-chain costs, price evolution, forecast supply and pricing.

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Region 3: Latin America and Asia-Pacific

Brazil, Chile, Uruguay, Argentina, New Zealand, Australia, Japan, China

Softwood forest area, net growth, ownership, harvests, supply-chain costs, price evolution, forecast supply and pricing.

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Pricing and packages

License:	Single-user	Corporate
Global overview	2,500	3,300
1 region + global overview	3,000	3,900
2 regions + global overview	5,250	6,825
3 regions + global overview	6,750	8,775
Datafiles, per report	600	600

Questions the series helps answer

- How much softwood supply is there globally, and how is it distributed?
- What factors are driving supply globally and in the key regions?
- How will global supply evolve– what regions have most potential?
- Which regions are structurally lower-cost, (forestry, logging, haulage)?
- How will supply and prices evolve?
- How will global log trade evolve?
- Which regions are most attractive for investment in softwood forestry?
- Which regions are most attractive for investment in softwood industries?

Who should by the reports

- 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 and consultants
- Financial institutions
- Industry associations
- Forest certification organizations and sustainability NGOs

Contact us to learn more

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