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New U.S. Market Rankings Show How Forest Industry Opportunities Vary by Investor Type

WATKINSVILLE, GEORGIA – September 19, 2019 – Where on the map should investors put capital to work in the U.S. forest industry? New research shows how the answer differs for timberland investors, sawtimber consumers, and users of pulpwood. For example, much of the Atlantic Coast supports both owning timber and operating mills. In isolation, South Mississippi and Northeast Texas favor sawtimber users, while markets in North Carolina and Arkansas favor pulpwood consumers. In the Pacific Northwest, scores highlight markets across Western Washington and Oregon for timber and mills.

The *2019 North American Forest Market & Industry Rankings* study, just published by Forisk, scores local markets in the U.S. South and Northwest for timberland investors and wood-using mills. Results profile ten years of change in the capacity and production for softwood and hardwood lumber, pulp and paper, OSB, plywood, and wood pellets with detailed geographic breakdowns.

“This work subdivides the South and Northwest into 37 markets – 30 in the South and 7 out West – based on mill infrastructure and how wood actually flows,” said Brooks Mendell, CEO of Forisk. “Three sets of rankings capture how a relatively ‘weaker’ market for sawmillers, for example, may advantage timberland investors and, overall, be good for everyone.”

Market assessments include measures of timber supply and demand, along with risk factors for logging capacity, residual markets, exports, and competition. “We also tested the sensitivity of each score to identify markets that offer more opportunity or risk for investors,” noted Dr. Shawn Baker, Vice President of Research at Forisk.

In conjunction, Forisk produces a dataset of mill capacity for softwood and hardwood lumber, structural panels (OSB and plywood), pulp, and wood pellets by region across five North American geographies – U.S. North, U.S. South, U.S. West, Eastern Canada, and Western Canada. The underlying data includes mill-by-mill details on location, type, and species, with ownership and capacity data by year for 2009-2019 and estimates for 2020-2021. The 2019 release includes wood use estimates, recycled percentage for pulp mills, and hardwood data.

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About: Forisk publishes the *Forisk Research Quarterly (FRQ)*, which includes timber forecasts, forest industry analysis, forest operations research and wood market rankings for North America. In total, Forisk subscribers own or manage over 100 million acres of timberland and use over 200 million tons of wood per year in the U.S. and Canada. For more information about Forisk’s research and educational services, visit www.forisk.com.

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