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Closures, Tariffs, and Policy Create Uncertainty in Fiber Markets

ATHENS, GEORGIA – September 16, 2025 – The *Forisk Wood Fiber Review (FWFR)* reports that weighted average U.S. prices for roundwood and chips (combined) fell 3% in Q3 2025 and are down 3% from Q3 2024. The same prices in Canada were flat for the quarter but up 9% year-over-year. Softwood roundwood prices fell in every U.S. region this quarter after increasing in Q2. Softwood Roundwood prices in the Northeast dropped 13% for the quarter while softwood residual chip prices were up 10%. Prices in this region have seen more variation as the market is affected by duties and tariff concerns. Hardwood roundwood prices were mixed for the quarter, flat in the Northeast, up 2% in the Lake States, and down 1-4% in all other regions. British Columbia prices were flat for the quarter on muted activity. In Ontario/Quebec, hardwood roundwood prices increased 7% while softwood residual prices stayed flat.

In Canada, chip prices were flat for the quarter but have increased 8% year-over-year. Softwood roundwood pulplog prices were flat for the quarter in British Columbia. Delivered softwood chip prices were flat in Alberta and East Ontario/Quebec for the quarter, and both are up 11% year-over-year. A common theme in Q3 reporting was the high demand for fiber in Western Canada, as Northwest U.S. producers suffer from a lack of available barge surge capacity to take advantage of the demand.

Weighted average prices for U.S. roundwood decreased 5% for the quarter, and chip prices fell 1% with regions varying significantly. Softwood residual chip prices in the Pacific Northwest dropped 3% for the quarter, while softwood roundwood dropped 5%. Both products are up year-over-year. Lake States softwood chip prices increased 1% and hardwood chips were flat. Hardwood roundwood prices increased 2% and softwood roundwood decreased 4%. The Northeast prices for softwood residual chips increased 10% while softwood roundwood fell 13% as mentioned previously. Southeast quarterly prices for softwood roundwood fell 5% and softwood residual chips were flat. South-Central region quarterly prices for softwood roundwood fell 2% and hardwood roundwood fell 4%. Softwood residual chips fell 3% and hardwood residual chips fell 2% this quarter. Stephen Wright, Associate Editor of the *FWFR*, said “The devastating effects of Hurricane Helene in 2024, coupled with three pulp and paper closures in the region so far in 2025, the formerly most competitive fiber basket in the U.S. Southeast is in a state of serious change.”

Wood fiber costs account for over half of total pulp manufacturing costs worldwide. The *Forisk Wood Fiber Review* includes prices and market commentary for all major North American regions, providing essential data for anyone that needs to track pulpwood, wood chips, and biomass prices in the world’s largest and most dynamic wood fiber markets. The *FWFR* provides updates on softwood and hardwood prices for major markets in North America. Prices are reported for wood delivered to consuming plants as a range and average. Each report also updates U.S. and Canada trade statistics for lumber, logs, wood pellets, wood chips and pulp.



For more information or to subscribe to the [Forisk Wood Fiber Review](#), visit www.forisk.com or contact: Nick DiLuzio, ndiluzio@forisk.com, 770.725.8447.

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