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Chris King
Forisk Wood Fiber Review Product Manager
Forisk Consulting LLC
770.725.8447
cking@forisk.com

Forest Products Industry Spent Q4 in Survival Mode; Ready for the New Year

ATHENS, GEORGIA – January 8, 2026 – The [Forisk Wood Fiber Review \(FWFR\)](#) reports that weighted average U.S. prices for roundwood and chips (combined) fell 6% in Q4 2025 and are down 6% from Q4 2024. The same prices in Canada were down 3% for the quarter and flat year-over-year. Softwood roundwood prices were either flat or down in Q4 across the U.S. and Canada. Production at most facilities slowed for the quarter as demand was insufficient to counter high operating costs and reduced investment. Curtailments and down-time were widespread in Q4.

British Columbia softwood roundwood prices were flat for the quarter while hardwood roundwood prices were down 2% in E. Ontario/Quebec. Delivered softwood chip prices were down 2% and 6% in British Columbia and Alberta, respectively. They were flat in E. Ontario/Quebec. According to Chris King, Product Manager of the *FWFR*, “Canadian forest products facilities are struggling to stay afloat with higher U.S. tariffs/duties and limited fiber availability. Higher costs and low demand have caused delayed investment, curtailed operations, and closures in some cases.”

U.S. softwood roundwood prices fell 14% in the U.S. Southeast as the market was adapting to new market realities in 2025 in light of closures. They fell 3% in the Northeast and were flat in all other regions. Softwood residual chip prices were down 5% in the Southeast, down 1% in the Northeast, and up 1% in other U.S. regions. Hardwood roundwood prices were down 7% and 4% in the Northeast and Southeast, respectively, while rising 6% in the South Central region. Northwest hardwood roundwood was up 1% and Lake States prices were flat. Hardwood residual chip prices were up 1% and 7% in the Southeast and South Central regions. They fell 1% in the Lake States and were flat in other regions. Brooks Mendell, CEO of Forisk Consulting, commented on PNW markets, “With prices down and overall lumber markets soft, several timberland owners and managers indicated that they had largely finished their harvesting activities for 2025 as of October and November.” This trend was seen in many regions as inventories were high and operations slowed. All are hoping to see markets pick up in 2026.

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.

About Forisk Consulting: Forisk delivers forecasts and analysis of forest industry markets and timberland investments. Firms participate in Forisk's research program by subscribing to the *Forisk Research Quarterly (FRQ)*, the *Forisk Wood Fiber Review*, or the North American Forest Industry Capacity Database; supporting benchmarking studies related to forest operations and mill capacities; and attending educational workshops. www.forisk.com.