



Forisk News, February 1, 2012

Archives available at: <http://www.forisk.com/News-v-38.html>

Subject line: Forisk News: Wood Demand – Bioenergy – Timberland Ownership

Wood Demand: Pine grade demand fell by 2.8% in Q4 2011. However, total pine sawtimber and chip-n-saw receipts for 2011 outpaced receipts for 2010. Mills usually buy less wood in Q4 as they have already built wood inventories, and work schedules are shorter for holidays. Though pine grade demand dropped in Q4, sawmills stockpiled inventory in Q3 and early Q4. Demand for pine pulpwood and in-woods chips remained constant in Q4 2011 when compared with Q3. Pulp mills increased wood purchases while OSB/panel mills reduced consumption. Mills reported that extremely dry fall weather contributed to full inventories.

- *Wood Demand Report Special Edition!* The Q4 2011 report includes annual wood consumption data by state and product from 2006 through 2011. The special edition report is available on Forisk Store, click [here](#).

Bioenergy: Projected wood demand for all announced projects in the U.S. dropped 7.4 million tons this month, a 6% decrease. This is largely attributed to the removal of several large biomass co-fire projects from the *Wood Bioenergy US* database, particularly in Ohio. Utilities claim that biomass is not as economic as other alternative compliance options. Also, some coal units are scheduled to shut down to meet EPA MACT requirements. *Wood Bioenergy US* includes 452 wood-consuming, announced and operating bioenergy projects in the continental US that could use 123 million green tons/year of wood by 2022. Projects representing only 69 million tons/year (56%) pass basic viability screening.

- For information on *Wood Bioenergy US*, which tracks and screens all announced and operating wood bioenergy projects in the United States, click [here](#).

Timberland Ownership: The top 300 timberland owners and managers in the U.S. account for nearly 84 million acres of private timberlands in the North, South, and West. The top 10 alone account for 32.5 million acres. Detailed analysis of these ownership groups highlight the continued shifting of acres to institutions, and the increased activity by private individuals and “family offices” in timberland markets.

- To learn more about US timberland ownership and Forisk’s tracking by state and region, check out the *2012 Forisk Timberland Owner List* [here](#).

Forisk Updates

- Applied Forest Finance, a one-day, CFE-qualifying course, will be taught on February 9, 2012 in Atlanta, GA. Click [here](#) for more information.

Forisk provides research and educational services to executives and analysts making decisions related to timber REITs, timberlands, and wood-using energy and manufacturing facilities.