



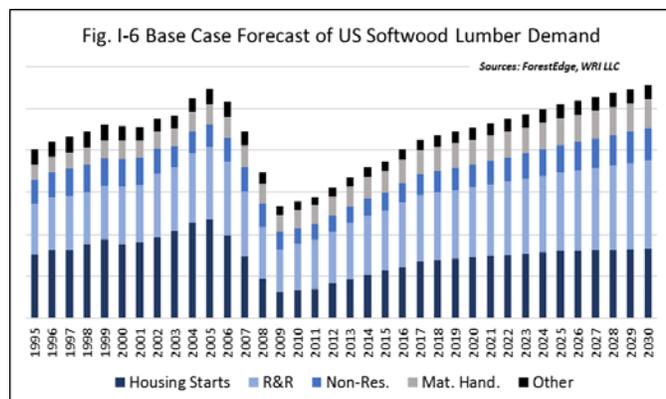
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Future Suppliers of Softwood Lumber to the US Market – Supply and Demand Outlook 2017-2030

A Multi-Client Study
by
ForestEdge LLC and
Wood Resources International LLC

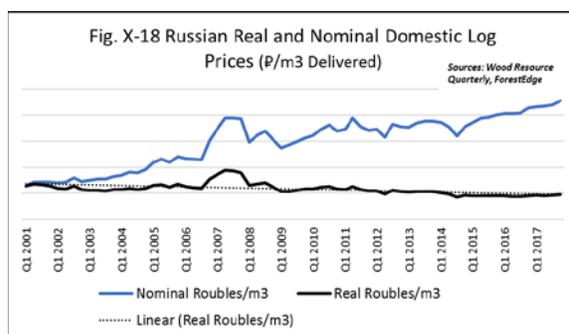
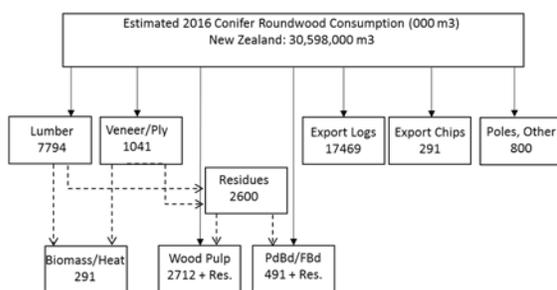
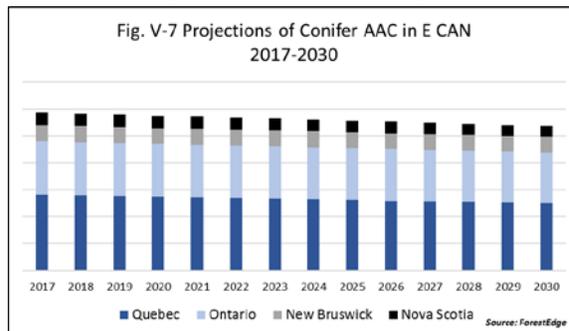
The purpose of this study was to evaluate how future US demand for softwood lumber will be met as the supply dynamics of North America change and off-shore supply and production economics evolve over the next decade.

The 215 page study covers:

I. Demand: Projected Demand for Softwood Lumber in the US for the period 2017-2030: Future lumber consumption is based on projections of housing starts (demographics, single/multi-family starts and average size), repair & remodeling expenditures and related softwood lumber consumption, and the evolution of other demand sectors including non-residential housing - CLT, and other industrial uses.



II. Supply: Projected Sources of Softwood Lumber Supply 2017-2030: includes detailed profiles of key softwood lumber production regions including *New Zealand, Chile, Brazil, Sweden, Eastern Canada, Western Canada, the US Northwest and the US South*. Each profile analyzes the current supply and use of softwood logs in the region, a projection of future timber supply and delivered log costs, an overview of the softwood sawmill industry and lumber production forecasts. Also included in the analysis is a lumber production cost model for product delivered to the US market. Finally, the study projects softwood lumber exports to the US in 2025 and 2030 for each profiled region.



Mini-profiles, evaluating softwood timber resources, delivered log prices, lumber trade and softwood lumber export potential to the US market of *Germany, Finland, Latvia, and Western Russia* are also provided.

III. Supply Curve Analysis: The study constructs a US softwood lumber supply curve for 2016 using actual supply statistics and estimated delivered softwood lumber costs for the key supplying regions. The study then evaluates how supply could change under alternative Demand Scenarios, based on regional projections of log costs, softwood lumber production, and likely US exports, to identify the most likely suppliers to the US market in 2025 and 2030. This Supply Curve Analysis goes on to discuss how delivered costs and trade may be impacted by changes in the supply sources.

IV. Conclusions and Sensitivities: In addition to reporting results for various demand scenarios, the study considers sensitivities based on investment capital and exchange rates, and offers insight into the implications of the changing US softwood lumber market on timberland investments.

For more information about the contents of the report, please contact:

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Why Purchase This Report?

The United States is the world's largest consumer and importer of softwood lumber and it is forecasted that wood consumption will increase in the future. The country mostly relies on domestically sourced lumber but import volumes to the US are substantial and reached 34% of total consumption in 2016.

Changes in availability of timber resources and forecasted increases in wood raw-material costs for sawmills around the world are likely to impact the trade of softwood lumber to the US in the future. Any company, or individual, that needs to better understand the outlook for US lumber demand, and potential changes in future supply sources to the US softwood lumber market would benefit from the detailed insights that this new multi-client study provides.

Who Will Benefit Most from This Comprehensive Study?

- Industrial Forest Owners
- TIMO's and REIT's
- Pension Funds
- Lumber Companies
- Forest Industry Consultants
- Governmental Agencies
- Housing Construction Companies
- Financial Institutions
- Lumber Traders
- Lumber Wholesalers
- DIY Home Center
- Furniture Manufacturers
- Freight Forwarding Companies
- Real Estate Companies

Important Questions Addressed in the Report:

- What is the Outlook for Softwood Lumber Production Capacity in the US South?
- Will European Sawmills be Competitive in the US Market in the Coming Decade?
- Can Chile Increase Softwood Lumber Exports to the US?
- How much will Lumber Shipments from British Columbia to the US Decline by 2030?
- Can Timber Harvests and Lumber production in Eastern Canada Increase in the Future?
- Can the US NW materially Increase Timber Harvests and will Log Exports Drop?
- Will Russia be an Important Softwood Lumber Supplier to the US in the Future?

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