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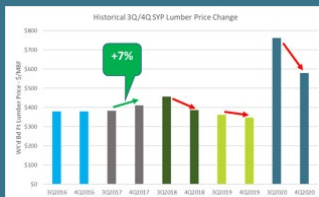


FOREST2MARKET



News & Information for the
Global Forest Products Industry

October 2021 Newsletter



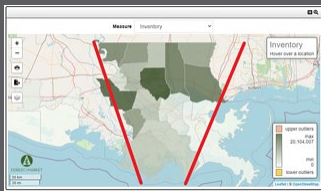
Lumber Prices Stabilize; Is More Volatility Around the Corner?

By: Joe Clark

Forest2Market SYP lumber price data over the last six weeks suggests that flat/decreasing demand from the home construction sector and expanded mill inventories have created a market that is better attuned to current needs than it has been in recent months. This should limit substantial price reactions in either direction and provide some much-needed stability. But for how long?

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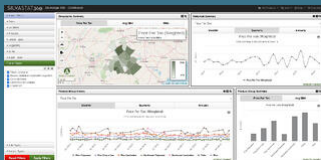


Timber Losses from Hurricane Ida Could be Significant

By: John Greene

On August 29, Hurricane Ida slammed into the coast of Louisiana as a Category 4 storm and became the second-most damaging hurricane to strike the state on record (Hurricane Katrina holds the top spot). Though not nearly as severe as the storm surge from Katrina, Ida also inflicted widespread flooding across the state and caused over \$18 billion in damage.

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Managing Timberland: Determining Fair Market Value

By: Joe Clark

Determining fair market value for a tract of timber can be a complex undertaking. The most precise starting point available is Forest2Market's Stumpage 360 database, which provides transparency into the details of millions of actual timber transactions throughout the US South over the last 20 years.

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Timber Prices & Inventories in the Lake States Continue to Fall

By: Joe Clark

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As we reported in late 1Q2021, delivered wood fiber prices in the Lake States hit their lowest point since Forest2Market began collecting transactional pricing data from the region over eight years ago. As we approach the end of 3Q and what has been yet another tumultuous year, prices continue to inch even lower.

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Forest Management in the US South is Model for Wildfire Risk Reduction

By: John Greene

Rationally and fairly solving this issue (and participating in related good faith discussions) is something those of us close to the forest supply chain have advocated for decades, though the response has largely been “crickets.”

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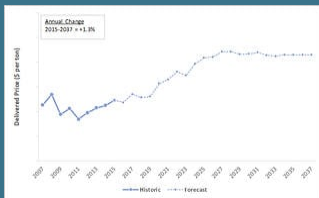
Why Wildfire Solutions Require More Than Money

By: Nick Smith

Wildfires burning across the Western US emitted enough carbon dioxide to wipe out more than half of the region’s emissions reductions in 2020. Nationally, 48% of the acres burned in 2021 have occurred on U.S. Forest Service protected lands.

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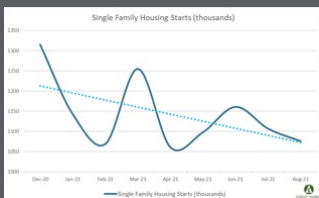


Will Raw Material Price Volatility Impact Your Budgeting Season?

By: Forest2Market

Raw material price volatility is perhaps the single biggest enemy of successful budgeting for manufacturers. Continued price instability and market speculation have been defining traits of the global economy over the last 18 months, and these challenges have the potential to undermine resource planning initiatives and erode margins.

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August Housing Starts Inch Up, But Single-Family Building Continues to Slow

By: John Greene

Total US housing starts inched up in August, though the pace of single-family building contracted for the second month in a row. Addressing the trend, CNBC noted that, "... builders continued to struggle with shortages of materials and labor, suggesting the housing market could remain a drag on economic growth in the third quarter."

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How Might Ongoing COVID Concerns Impact the Pulp & Paper Industry?

By: Stuart Sharp

While I do not foresee another lockdown like we experienced last year, if we do end up in a similar situation however, the Tissue and Towel sector will be better equipped to handle it. Hoarding will most likely occur again, but there will not be a large increase in the production of T&T products.

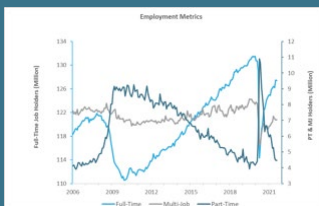
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Germany's Careful Expansion and Slow Growth in the Global Tissue Industry

By: Bruce Janda

Germany played a vital role in developing pulp and paper technology at the birth of the industry. This role has continued into the 21st century as Germany is home to many companies supplying tissue production and converting technologies all over the world.

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Pandemic-Fueled Uncertainty Continues to Hobble Labor Market

By: Forest2Market

Full-time jobs nudged down (30,000) to 127.4 million. Workers employed part time for economic reasons slipped by 14,000, whereas those working part time for non-economic reasons jumped by 272,000; multiple-job holders advanced by 15,000.

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Industrial Activity Metrics			
Metric / Industry	Previous		
	2021:07	Month	Year
	% Change		
Industrial Production Index	101.1	0.9	6.6
Manufacturing	100.2	1.4	7.4
Wood Products	98.3	0.1	4.9
Paper	94.7	1.0	5.3
Capacity Utilization Index	76.1	0.9	6.4
Manufacturing	76.8	1.3	7.4
Wood Products	79.8	0.1	4.5
Paper	83.4	0.9	5.1
Capacity Index	132.8	0.0	0.1
Manufacturing	130.4	0.0	0.0
Wood Products	123.1	0.0	0.4
Paper	113.5	0.1	0.2
New Orders (Billion \$)	508.1	0.4	15.6
Ex. Transportation	432.8	0.8	14.9
Investment Spending	76.6	0.1	14.8

Sources: Federal Reserve Board & U.S. Census Bureau

US Forest Industry & Manufacturing Performance Steady in 3Q

By: Joe Clark

Total industrial production (IP) increased 0.9 percent in July (+6.6 percent year-over-year [YoY], but 0.2 percent below February 2020's pre-pandemic level). The output of utilities decreased 2.1 percent in July; mining: +1.2 percent.

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