US Forest Products Sector Overview
“Forest” area (>20 million hectare)

This shape represents 100 million hectares. Area of shapes is directly proportional to forest area.

Source: FAO

Key:

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Production industrial round wood

(>15 million cu.m.)

Key:

This shape represents 100 million cubic metres. Areas shown are directly proportional to volume.


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Consumption timber, pulp & paper (>20mi cu.m. RWE)

Key:
This shape represents 100 million cubic metres Round Wood Equivalent volume. Areas shown are directly proportional to volume.


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90% of industrial wood is produced in 25 countries

Source: FAO, SOFO 97, LEK analysis

90% of industrial wood is produced in 25 countries. According to the FAO, SOFO 97, LEK analysis, 90% of industrial wood is produced in 25 countries. The majority of the production is in non-tropical regions, with countries like the USA, Canada, China, Brazil, and Russian Federation producing the largest quantities. The graph shows the percentage of total world production contributed by each country, with the USA leading significantly.
**U.S. Forest Products Consumption**
(production plus net imports)

- **Net Imports**
- **Paper & paperboard**
- **Composites production**
- **Lumber & miscellaneous**

- Paper/paperboard increases most
- Net Imports: 0.9% per year increase
- Lumber & miscellaneous: 1.9% per year increase

Million tons, dry weight

- 1960: 0
- 1970: 0
- 1980: 0
- 1990: 0
- 2000: 0
- 2010: 0
- 2020: 0
- 2030: 0
- 2040: 0
- 2050: 0
Paper and Paperboard Percentages

- Containerboard: 37%
- Printing/Writing: 28%
- Boxboard: 16%
- Newsprint: 8%
- Tissue: 7%
- Packaging Papers: 5%

US Consumption – 100 million tons/yr
Wood use per single family house
(cubic meters)

Source: D. McKeever, USDA Forest Products Lab
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U.S. Wood Products Consumption

75% goes to residential markets
Housing market is still primary outlet!

**2002 Softwood Lumber**
- 52.6 BBF (128 million cubic meters)
  - R&A: 34%
  - New Residential*: 41%
  - Industrial: 19%
  - NR: 6%

**2002 Structural Panels**
- 37.1 BSF (3/8) (33 million cubic meters)
  - R&A: 22%
  - New Residential*: 53%
  - Industrial: 16%
  - NR: 9%

*New residential includes single-family, multi-family, and mobile homes

Source: APA & SFPA, Market Outlook, September 2002
Wood & Competitive Materials in Residential Buildings

Volume Basis, 2003

- Solid wood: 40%
- Engineered wood: 39%
- Metals: 5%
- Others: 11%
- Plasctics: 5%
Georgia Pulp Mills

Georgia Pulp Mills

Rivers

Pulp Mills

Roads

Georgia Pulp Mills

Ponderosa Georgia Augusta Newsprint (Abitibi & Thompson Newsprint)

International Paper

Grupo Industrial Durango (Gilman Paper)

Inland Paperboard & Packaging

Armstrong World Industries

Riverwood International

Weyerhaeuser

Georgia-Pacific

Packaging Corp. of America

Southeast Paper Mfg

Rayonier

Interstate Paper

Georgia-Pacific

Inte
U. S. South Total Pulpwood Consumption

Volume (million tons)

Source: Forest Resources Association (formerly American Pulpwood Assoc.)

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Trends in Wood Pulp Capacity
Million tons

Source: FRA (APA), USDA Southern Research Station, and Pulp & Paper NA Fact Book, TimberMart-South
Global Paper and Board Consumption

Over the past 23 years global paper and paperboard consumption has grown 3.0% a year on average
Global Demand for Paper and Paperboard

World demand for paper and paperboard continues to grow by a growth rate of 2.2 percent a year to 450 million tons by the year 2015.

[Graph showing demand for paper and paperboard by region from 1980 to 2015.]
Global Consumption of Papermaking Fibre

World consumption of papermaking fibre forecast to grow to 460 million tons by the year 2015, or 2.3%/a on average.