Forest Markets and Silviculture

NC Longleaf Summit

December 3, 2025

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The N.C. Forest Service is a division of the N.C. Depart. of Agriculture & Consumer Services *Steve Troxler, Commissioner*

Agenda

Broad overview of wood markets in NC & what drives them (very brief)

How Markets Influence

Forest Management Decisions

Types of Products


Lumber/Dimensional Stock


Pulp & Paper


Pellets


Pallets


Poles


OSB

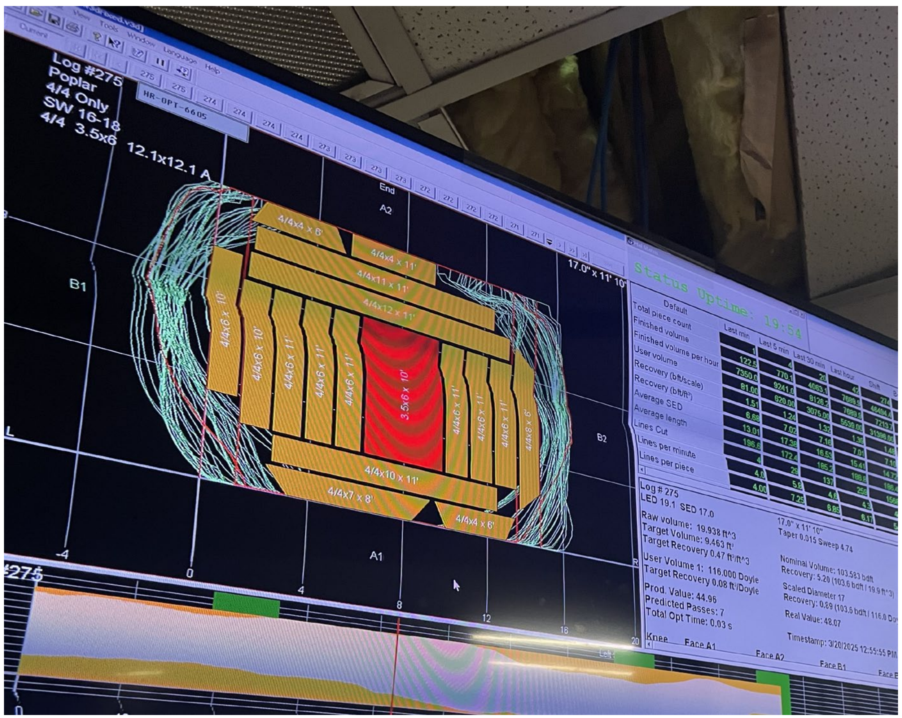

Plywood

Commercial Firewood

And the list goes on and, on and on…

Primary Forest Product Companies in NC

$42.5 billion industry output
$1.72 billion in exports



Woodyards	19
Commercial Firewood	47 +
Chip Mills	6
Sawmills	96
Custom & Portable Sawmills	70 +
Shavings Mill	6
Stave Mill	1
Pulp & Paper Mills	4
Plywood/Veneer Mills	3
Pellet Mills	4
Oriented Strand Board	2
Pole/Post Mills	4
Composite Panels	2
	128?

Constant changes in NC markets

Market Gains

2 new pine sawmills (2023)

- Binderholz, Enfield, NC
- Roseburg Forest Products, Weldon, NC

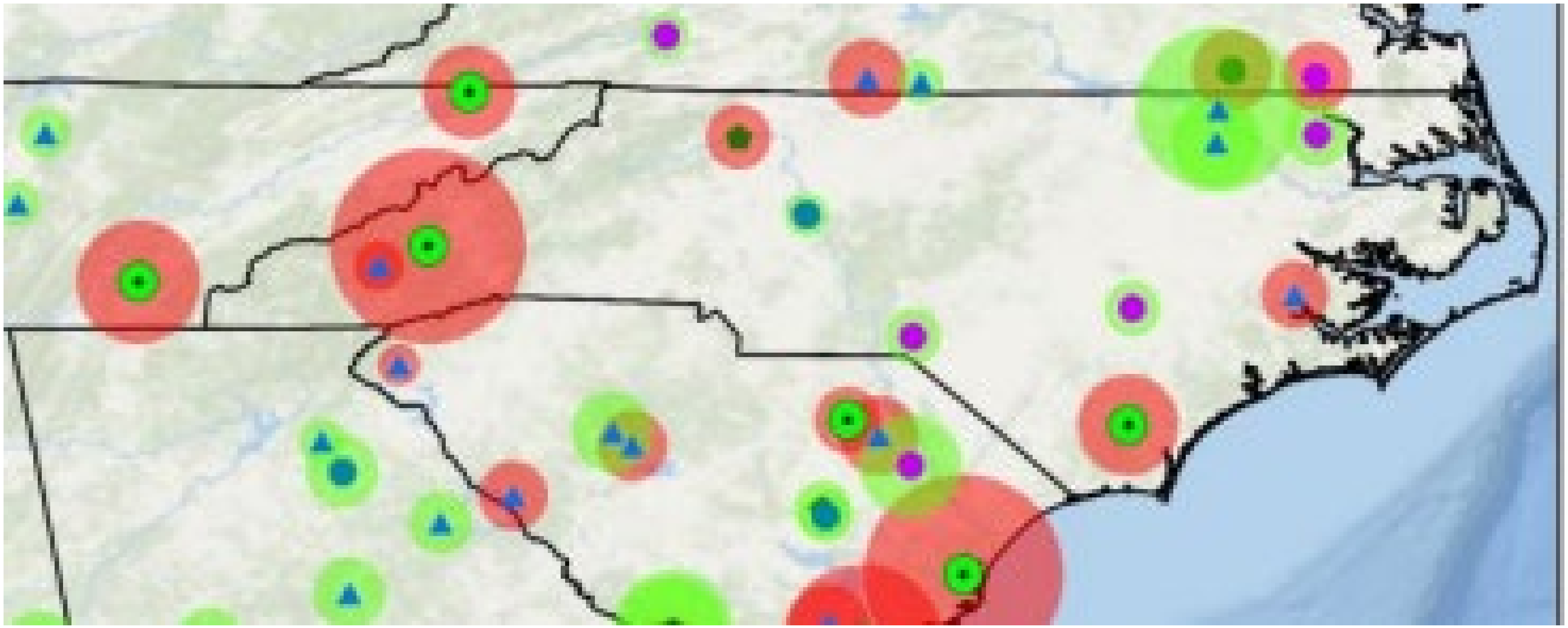
Market Losses

- Pactiv Evergreen Pulp & Paper Mill, Canton NC (2023)
- IP Pulp Mill, Riegelwood, NC (50% capacity), 2023)
- Weyerhaeuser Sawmill, Vanceboro, NC 2024
- Southern Veneer, Moncure, October 2025

➢ GP Emporia VA Plywood (May 2025)

➢ Canfor Darlington SC sawmill (August 2025)

Local Changes 2022-2025



Question:
What drives NC wood markets?

Answer

1. Each category of wood products has unique drivers
2. Our “local” mills are impacted more by international policies/trade than you would think!

Category	Uses	Drivers
Pine Lumber 	• Treated lumber • Joists • Trusts	• Housing starts • Remodel
Hardwood Lumber 	• Furniture • Flooring • Cabinetry	• Export up to 50% • Tariffs having big impact • Lots of small mills in NC

Category	Uses	Drivers
Fluff Pulp 	• Diapers • Hygienic products • Packaging	• HUGE international trade • Our mills are old
Pellets 	• Make electricity (burn wood pellets instead of coal)	• Carbon policies • Economics of natural gas

Conclusion to Part 1

- North Carolina does have wood markets
- The markets are **very** dynamic
- Gaps are emerging

Part 2
How Markets Influence Forest Management

General Considerations

What markets are in your area?

- Start marketing a year or more in advance, etc.

How many acres are available?

- Tracts under 30 acres hard to get thinned

Grow as high a quality product as possible

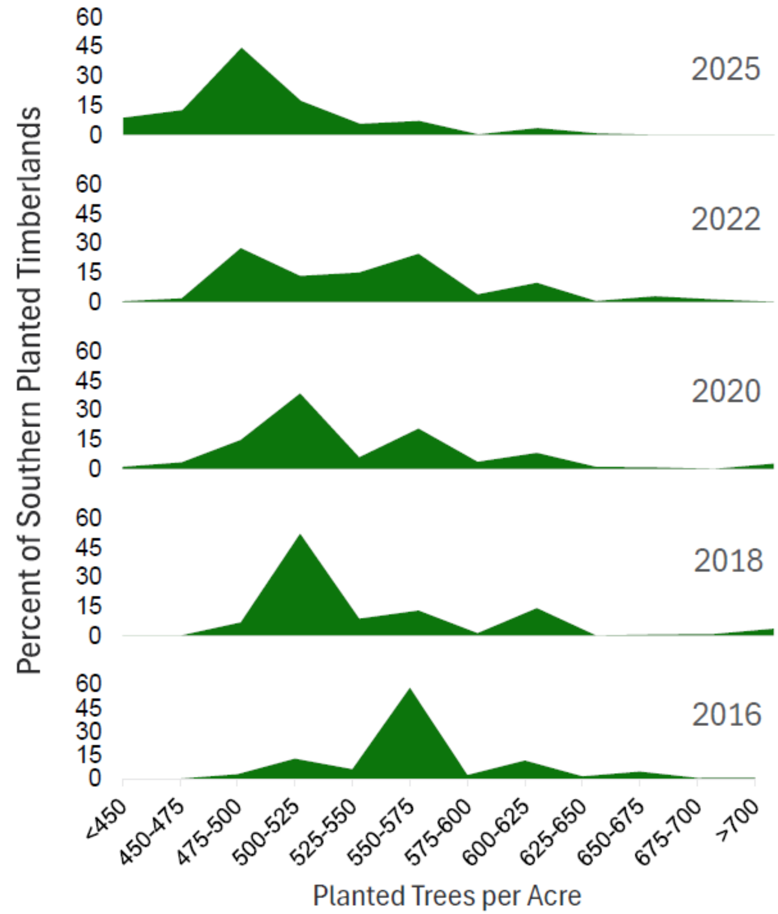
- There is more supply than demand

Future trends

1. Even in areas with "good" markets, getting rid of pine pulpwood will be tough
2. Due to decreased logging capacity, getting thinnings done at all will be tough
3. Getting rid of hardwood pulpwood will be next to impossible (Site prep spray? Mid rotation spray? Burn?)

Planting Densities are Declining

Getting rid of pulpwood is **tough**: So plant fewer (but better) trees!



Source: Forisk

Forisk Consulting | forisk.com | 12

Advantages of fewer trees per acre

- *"When sawtimber production is the goal and thinning is not part of an overall stand management plan, 300 trees/ac planted does not appear to underuse the site."*
    - Rotation-Age Results from a Loblolly Pine Spacing Trial
      Southern Journal of Applied Forestry - Burkhart -February 2012
- Planting at lower densities buys us additional time to market and thin the stand.
- Consider pre-commercial thinning existing stands that we'd traditionally consider well stocked.

Conclusions

North Carolina has a variety mills but geographic gaps in wood markets are emerging from

1. Persistent industrial contractions and
2. Fewer, but larger mills

Landowners and foresters are going to have to

1. Understand their local timber markets,
2. Aggressively market their timber,
3. Reduce costs **<u>and</u>**
4. Grow the best product possible

Questions?

Learn more at www.ncforestservice.gov

PRESENTED BY

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