

Council on Forestry September Update

Wisconsin Forests **FIRST**
Industry Roadmap

[Forest Industry Roadmap and Strategies for Tomorrow]

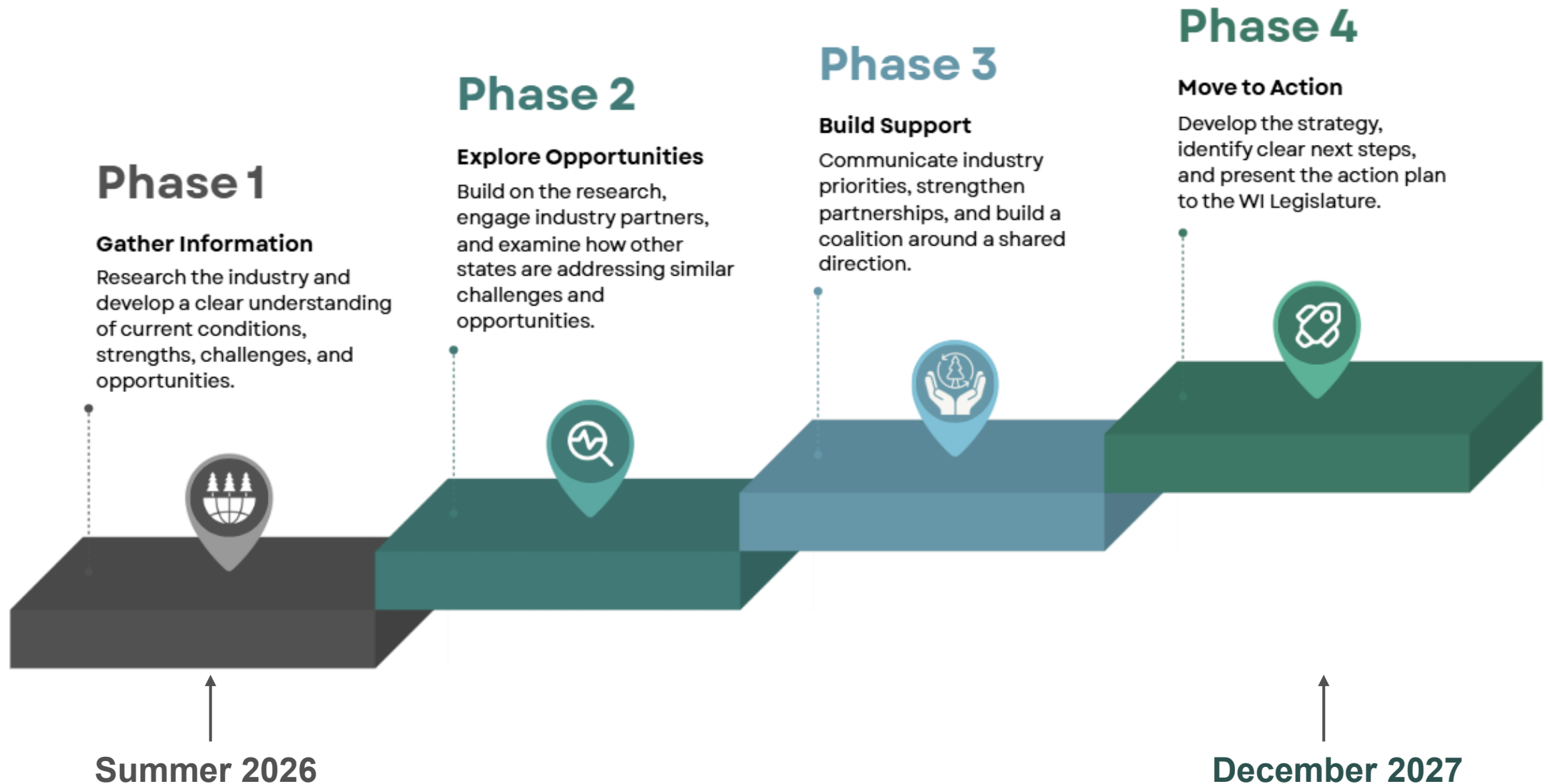


September 16, 2026

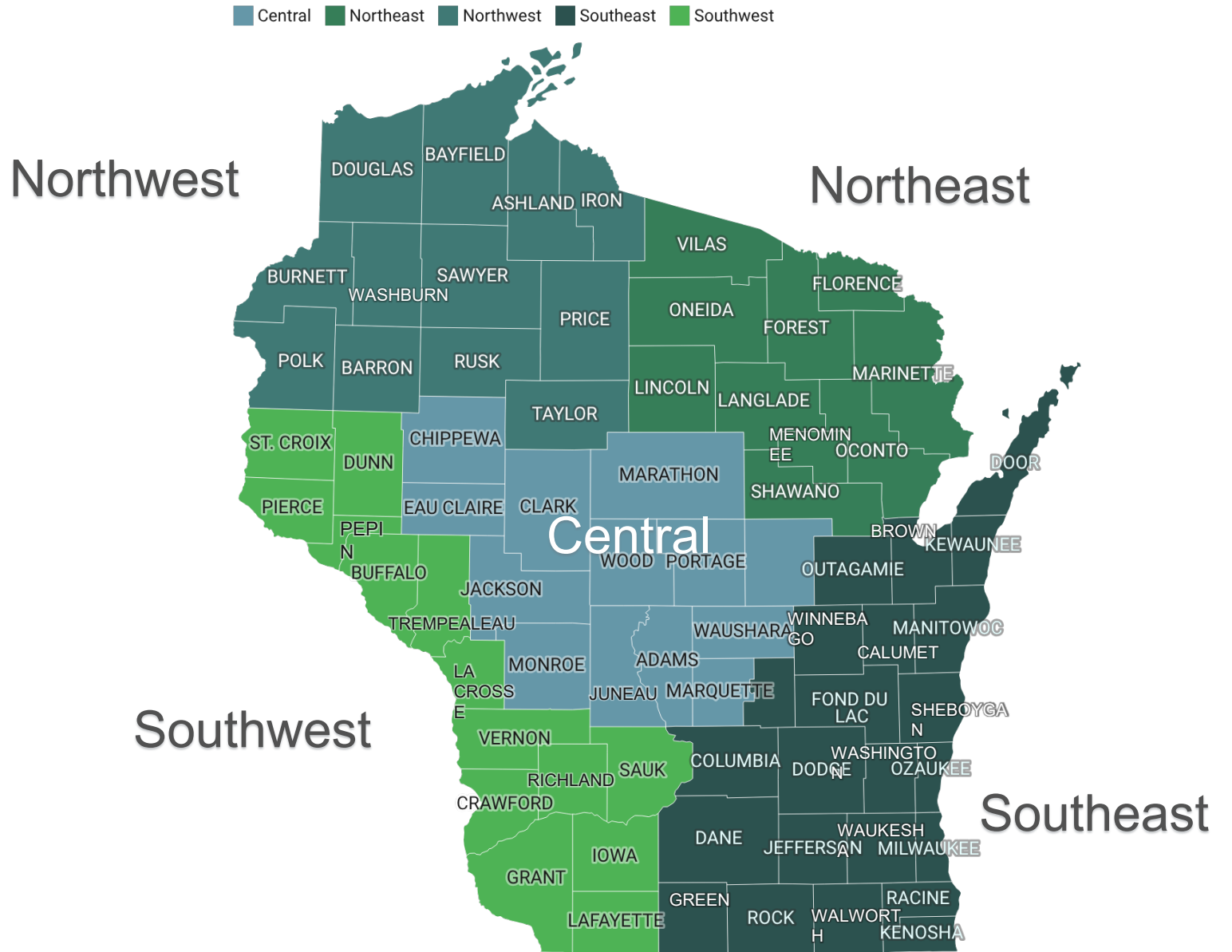
What we're covering in today's meeting

- **Updates from Research Component #1** – primarily the stakeholder engagement and Wood Supply Assessment
- **Updates from Research Component #2** – what the focus areas for state-state comparison are, what we hope to accomplish
- **What's next and upcoming events** – What is on the horizon, and what to expect for the final meeting of the year.

Phased Process



Wisconsin Counties by Region



Research Component #1

Industry Overview

The industry overview includes data like jobs, earnings, output, GRP, imports/exports, occupational data, state-to-state comparisons, interviews and more.



USA Trade® Online

IMPLAN

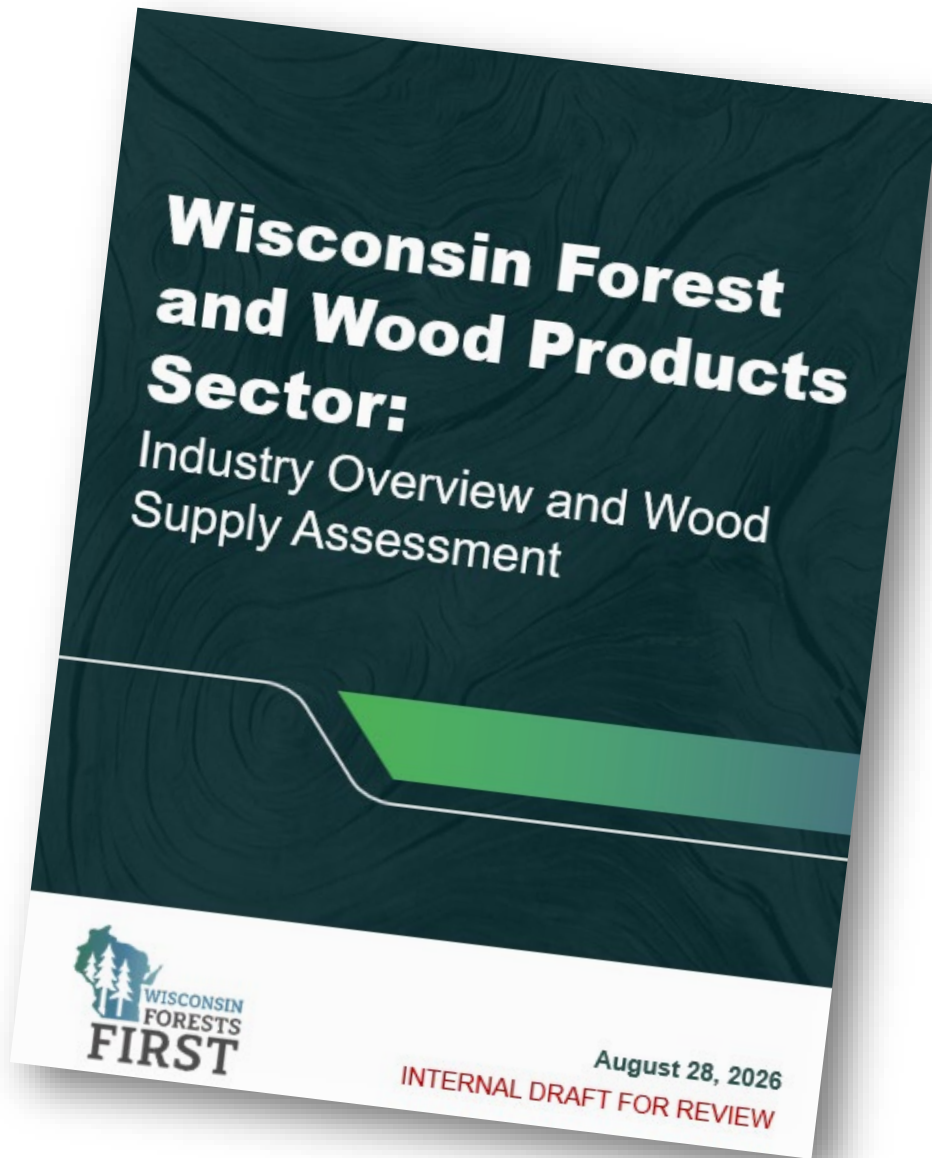
Wood Supply Assessment

Evaluating the status of the state's wood supply using USDA Forest Inventory & Analysis, state and regional data, and interviews.



Forest Service

U. S. DEPARTMENT OF AGRICULTURE



Project Update: Research Component #1



Camoin / INRS led interviews with Steering Committee + Executive Committee

23 interviews capturing perspectives from across
the sector



Wood Supply Assessment

Inventory, growth vs. harvest, and physical surplus
— discounted by five market-availability factors to
estimate the total resource available by region



Executive Summary

10 takeaways from the industry overview,
interviews, and wood supply assessment — and
what comes next

What We Heard

Themes from the interviews cluster around three connected areas. Together, they define what Wisconsin must address to keep its forest products industry viable and forest health strong.



Strengthen

Stabilize & invest in the foundation

Existing mills and logging capacity

Private landowners and timber supply

Transportation and energy infrastructure

Industry retention and reinvestment



Develop

Build the capabilities Wisconsin needs

Workforce pipeline and business succession

Policy alignment and regulatory clarity

Investment readiness and economic development

Sector coordination and public narrative



Diversify

Expand into new markets & innovation

New and emerging product markets (R&D)

Biomass, engineered wood, and bio-based products

Long-term innovation and research commercialization

Sustainability positioning

Project Update: Research Component #1

Camoin / INRS led interviews with SC + EC

22 interviews capturing perspectives from across the sector.

Wood Supply Assessment

Inventory, growth vs. harvest, and physical surplus — discounted by five market-availability factors to estimate the total resource available by region

Executive Summary

10 takeaways from the industry overview, interviews, and wood supply assessment — and what comes next.

Data Notes on the Wood Supply Assessment



The Forest Inventory and Analysis (FIA) group within the US Forest Service collects data annually from a subset of permanent plots on a grid density of approximately one plot for every 6,500 acres of timberland.



A complete re-inventory of all plots occurs every 5 - 7 years on a continuous basis. INRS used the most recent complete FIA information, which uses data collected from 2019 through 2025 and represents the latest available complete cycle. The data does not represent a single year, but rather an annualized number based upon this period.



The Forest Inventory and Analysis data is based upon sampling, and not a full inventory of all land and timber. As a result, there are sampling errors associated with the use of this data; INRS reports here using the mid-point of each estimate.

Net Growth vs. Removals

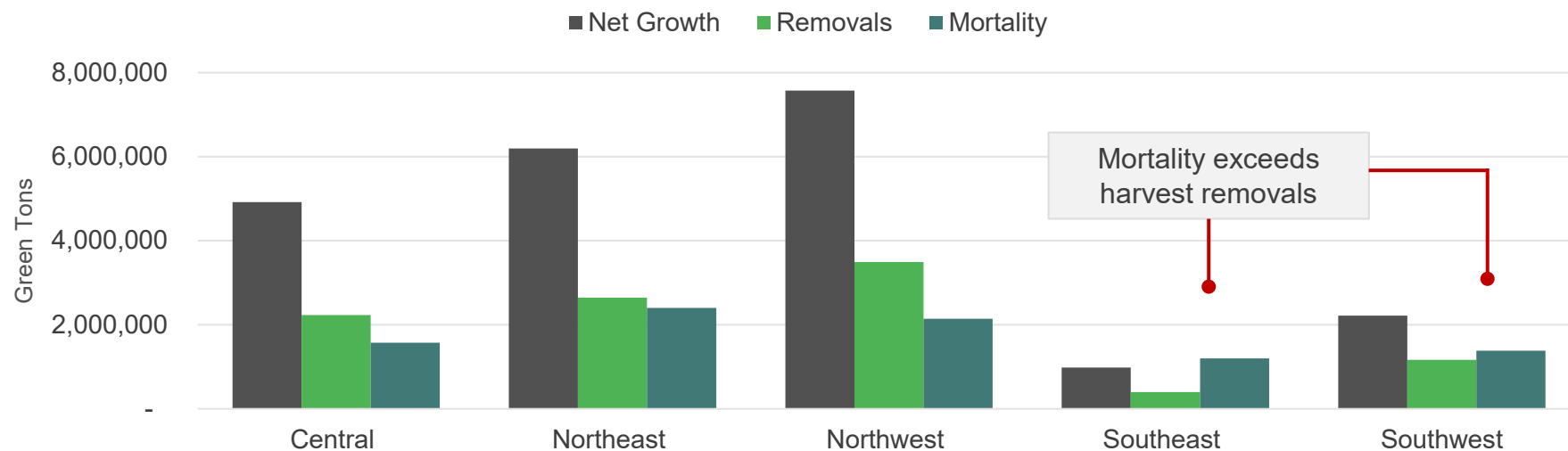
~2.2X

Annual Timber
Growth vs. Removals

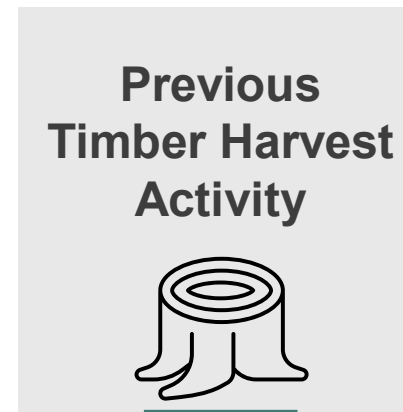
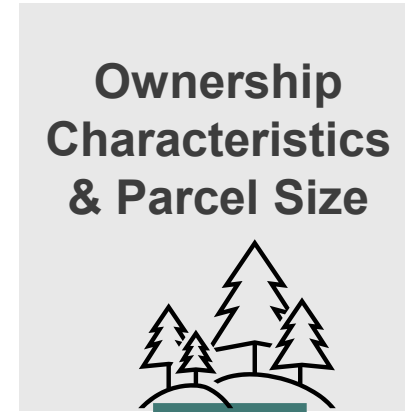
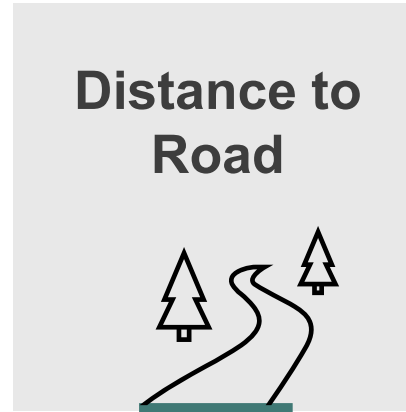
Wisconsin's annual net timber growth is more than twice the volume removed each year.

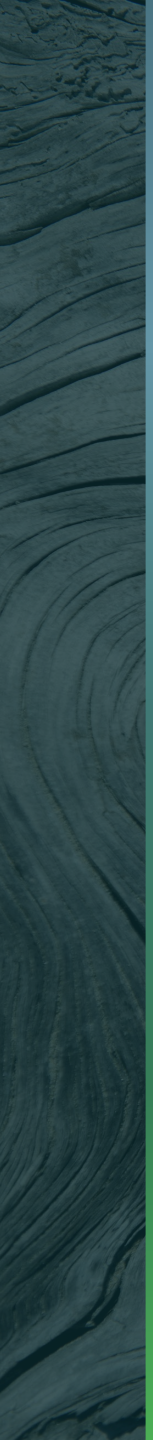
DRAFT

Net Growth, Removals, and Mortality by Region, All Species



Physical and Social Factors Influencing Timber Availability





Total Resource Available*

*subject to constraints



Supply is Statewide, Concentrated in Three Regions

All regions and landowner types have additional wood available.

- Central, Northeast, and Northwest hold the largest volumes.

Market Factors Will Shape Actual Availability

Prices paid to landowners and loggers, and logging capacity, will determine how much is realized — neither is a factor in this analysis.

Project Update: Research Component #1



Camoin / INRS led interviews with SC + EC

22 interviews capturing perspectives from across the sector, not just the data.



Wood Supply Assessment

Inventory, growth vs. harvest, and physical surplus — discounted by five market-availability factors to estimate the total resource available by region.



Executive Summary

10 takeaways from the industry overview, interviews, and wood supply assessment — and what comes next

Organizing How the Roadmap Unfolds



01

Strengthen

Invest in the sector's foundational assets.



02

Develop

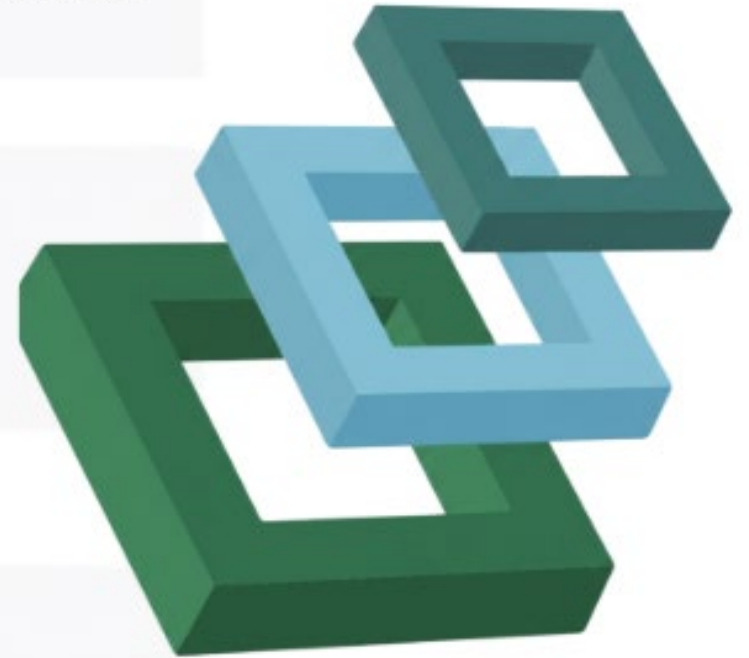
Build stronger connections, capacity, and sector support.



03

Diversify

Expand markets and viable uses for Wisconsin wood.



What We Have Learned So Far



Strengthen

1. Wisconsin has a specialized forest products sector that remains a critical part of the state economy.
2. Wisconsin has a substantial and growing wood resource, but supply conditions vary across the state.
3. Private landowners control nearly 73% of Wisconsin's timberland, making their harvest decisions a key factor in future wood supply.
4. The systems the sector depends on are under increasing strain.
5. Reinvestment in Wisconsin's pulp and paper strengths is critical to retaining its competitive position and adapting to changing markets across the sector.



Develop

6. Wisconsin's workforce challenge is increasingly about replacement and changing skillsets.
7. The industry's statewide footprint is broader than the location of Wisconsin's forests.
8. Wisconsin has strong industry assets, but they have not yet been organized into a compelling case for investment.



Diversify

9. Capturing opportunities will require bold investments and regional collaboration, with private-sector partners piloting the most viable applications.
10. Wisconsin has strong forest-products assets and realizing their full potential will require defined pathways to bring emerging products to scale.

Next Steps and Research Priorities

Potential Follow-Up Conversations

- Policy and investment environment benchmarking
- Investment readiness data
- Emerging market viability
- Recycled vs. virgin fiber dynamics
- Transportation - Rail and port capacity, roads

Potential Follow-Up Conversations

- Regional planning organizations and economic developers
- Technical colleges and workforce organizations
- Research commercialization partners
- Rail, freight, port, and energy experts
- Logging contractors, equipment lenders, and insurance experts

Project Update: Research Component #2

5 Areas of Focus

1. Forest management and landowner policy
2. Industry retention, competitiveness, and investment position
3. Permitting and regulatory environment
4. Emerging markets and product innovation
5. Governance and forestry-industry strategy

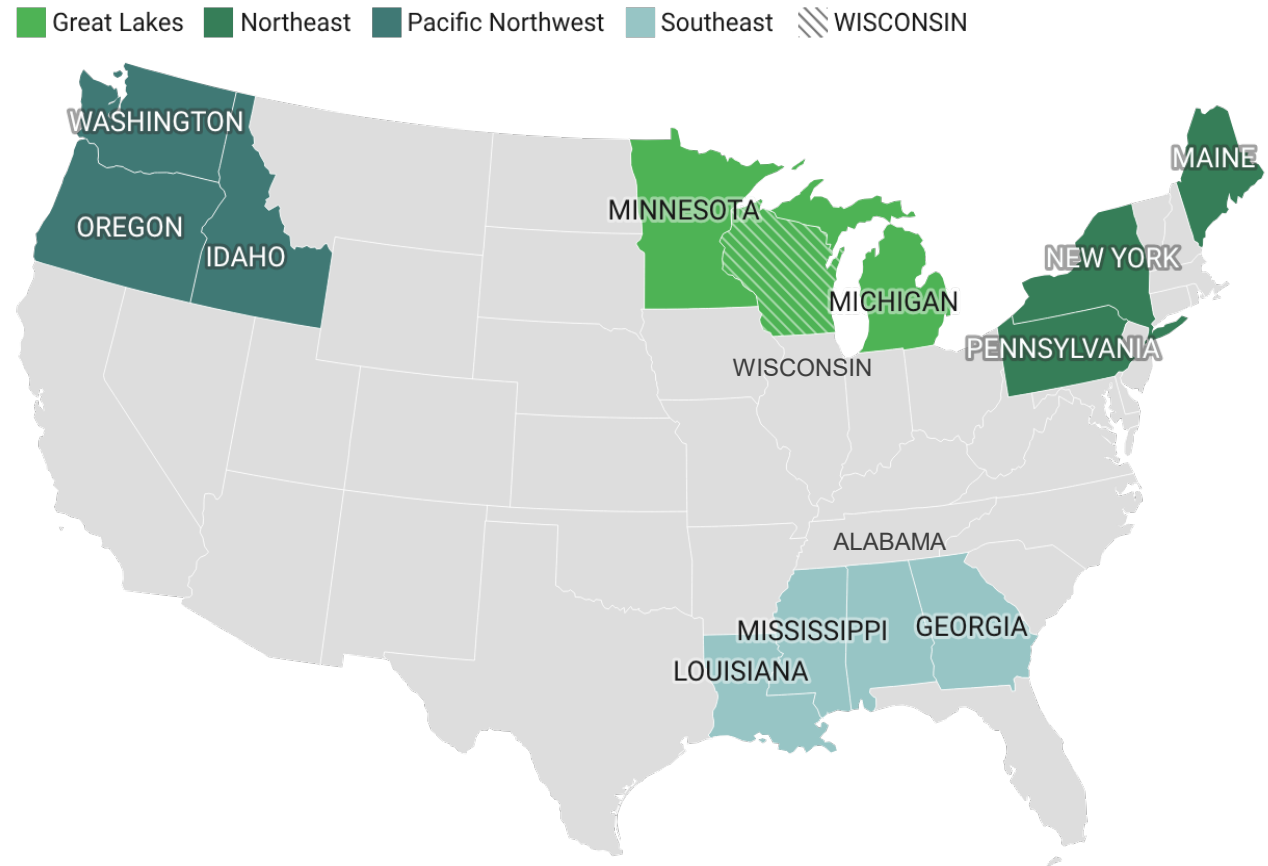
Determine peer regions/states

Timeline

September – December 2026

Selecting Forest and Wood Products Regions

- Areas of focus? Areas of less priority?
- Other states based on recent market activity?



On the Horizon



Early November

WPC and CoF to attend and present at FRA on Sept 29

GLTPA to attend and give an update to WI County Highway Association Annual Conference

November election – opportunity to (re)engage elected leaders, showcase what has been accomplished and “the ask” for them in Phase 3

Discussion



Questions