

Council on Forestry May Update

Wisconsin Forests **FIRST**
Industry Roadmap

[Forest Industry Roadmap and Strategies for Tomorrow]



May 21, 2026

You will leave today with...

- An understanding of how the project is engaging industry leaders and stakeholders across Wisconsin.
- Insight into how we will explore the market trends, emerging opportunities, and disruptive forces shaping the future of the forest and wood products sector.
- An overview of the project's methodological approach to data analysis and stakeholder engagement.
- An understanding of the next steps that will guide the strategy and implementation phases of the initiative.

Potential economic outcomes when the roadmap is successful.



Economic Strength

- GRP / value added
- Market expansion
- Supply chain resilience



Workforce Quality

- Higher average wages
- Upskilling and talent pipeline
- Retention and attraction



Investment Prospects

- Support efficiencies of existing markets
- Accessing emerging markets



Healthy Forests

- Healthy, productive forests
- Strong industry awareness

Potential Metrics: Productivity | Output per worker | Business growth | Investment | Public Awareness

Project Update: Research Component #1

Defining the Sector

Reviewing definitions of existing studies, previous state-level reports, and determining components of the sector

Involving the Steering Committee

Confirming composition, kickoff, digital engagement, introduction of data, and interviews

Industry Baseline Assessment

Conducting an industry overview, including data like jobs, earnings, output, GRP, imports/exports, location quotient, occupational data, and more.

Forest and Wood Products Sector

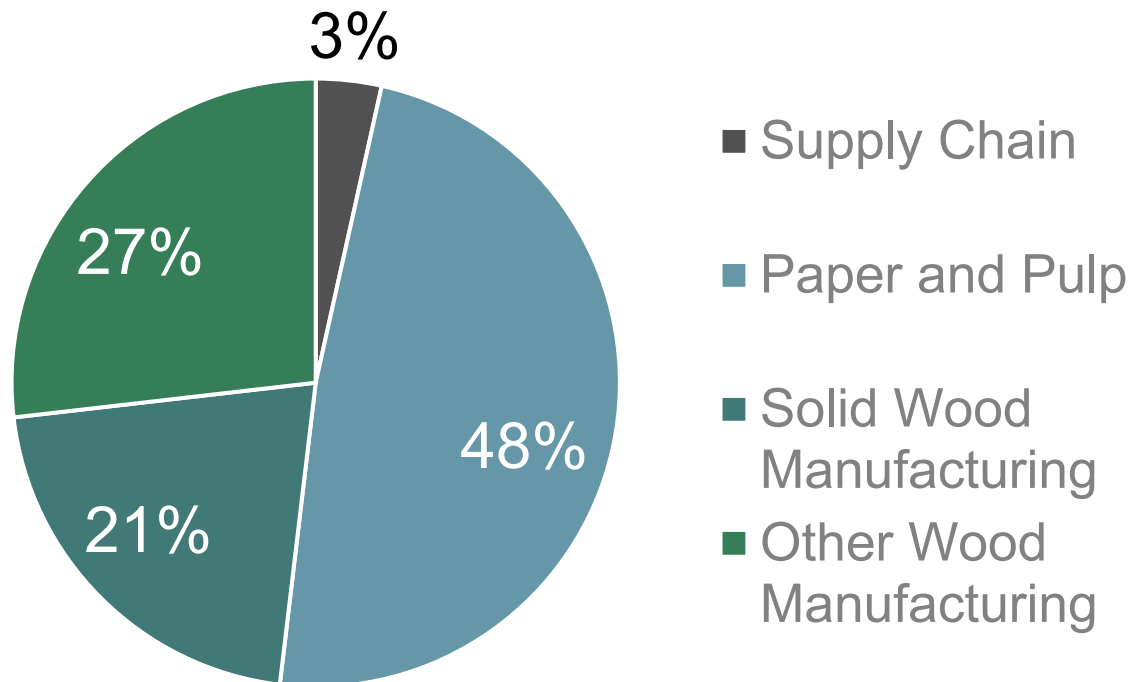


4 SUBSECTORS



Wisconsin's Forestry and Wood Products Sector

Sector Composition by Jobs in Subsector



Data Notes

- Methodology and definitions will be described in detail.
- Accounts for private sector job activity.

Project Update

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Guiding Principles for Steering Committee



This process is an opportunity to bring those different viewpoints together.



Asking questions is encouraged.



We recognize that perspectives and priorities will differ across the group.



There is no single “right” answer—diverse input is valuable and necessary.



Open, respectful dialogue will help strengthen the outcomes of this work.

Steering Committee

Matt Carothers, Superior Woodlands Company

Dr. John Coulston, National Council for Air and Stream Improvement

Dustin Delsman, Plumbers & Steamfitters Local 400

Carmen Hardin, Wisconsin Department of Natural Resources – Forestry

Jim Hoppe, Packaging Corporation of America

Nels Huse, Menominee Tribal Enterprises

Meleesa Johnson, Wisconsin's Green Fire

Mike Koles, Wisconsin Towns Association

Rebekah Luedtke, Wisconsin County Forest Association

Bill Millard, Granite Valley Forest Products Inc

Nick Monkevich, Billerud

Don Nelson, Domtar

Patrick Rappold, US Forest Service – Region 9

Dr. Adena Rissman, University of Wisconsin-Madison

Laura Seidman, American Forest and Paper Association

Patrick Vander Sanden, Wisconsin County Highway Association

Travis Zydzik, Ahlstrom Group

Exploring Expertise



Market Transition, Innovation, and Emerging Opportunities



Fiber Supply, Logging Capacity, and Supply Chain



Industry Competitiveness, Disruptive Forces



Workforce and Training Pipeline



Public Understanding, Industry Awareness

Project Update

Defining the Sector

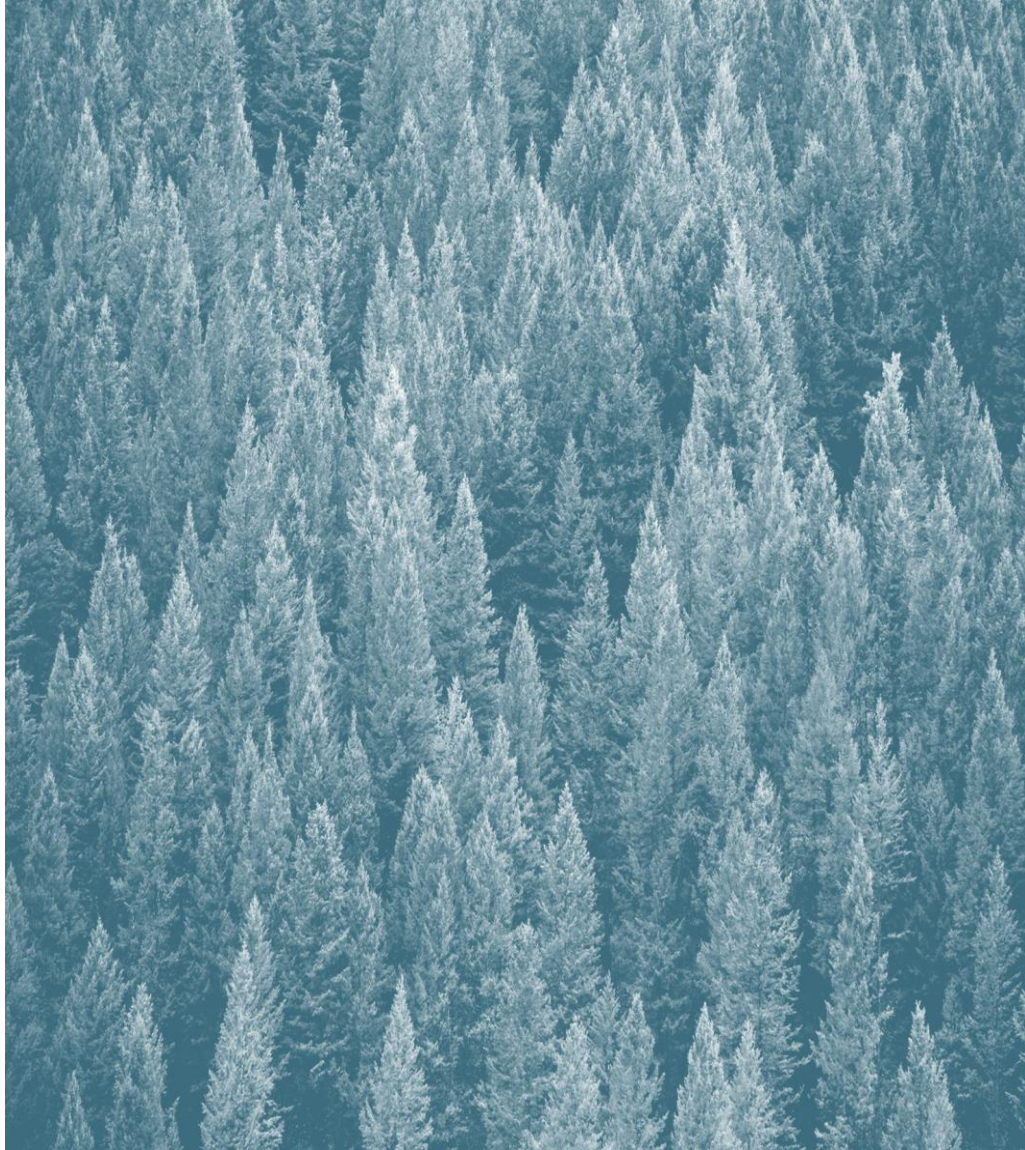
Reviewing definitions of existing studies, previous state-level reports, and determining components of the sector

Involving the Steering Committee

Confirming composition, kickoff, digital engagement, introduction of data, and upcoming interviews

Industry Baseline Assessment + Wood Supply Assessment

Conducting an industry overview, including data like jobs, earnings, output, GRP, imports/exports, location quotient, occupational data, and more.



Part I - Data Snapshot

Sector Overview

How the overall industry is positioned today.

 Lightcast

Subsector Overview

How different parts of the industry are changing over time.

 Lightcast

Foreign & Domestic Trade

How Wisconsin connects to broader markets.

 USA Trade[®] Online

 IMPLAN

Workforce

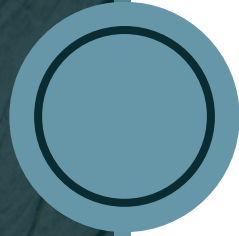
What the data show about the industry's talent base.

 Lightcast

Part II – Wood Supply Assessment

- Define regions for analysis | **100% Complete**
- For each region (and in aggregate) | **In Progress**
 - Timberland acreage and ownership group
 - By species
 - Annual net growth
 - Annual removals
 - Both total removals and harvest removals
 - Annual mortality (included in net growth, but will be identified separately as well)
 - Split by sawlog and non-sawlog (using FIA sawlog definitions)
- Working with stakeholders and any available literature / public data, estimate historic removals by product type and species, by region, if possible | **In Progress**
- Estimate harvest limits | **In Progress**
- Interview with a sampling of land managers to determine | **To be completed**
- Aggregate above to estimate reductions from physically available material | **To be completed**
- Provide a forecast (or range of forecasts) on future wood availability | **To be completed**

Next Steps



Schedule Interviews with Steering Committee (SC) Members



Advance the Industry Report and Fiber Supply Deliverable for August

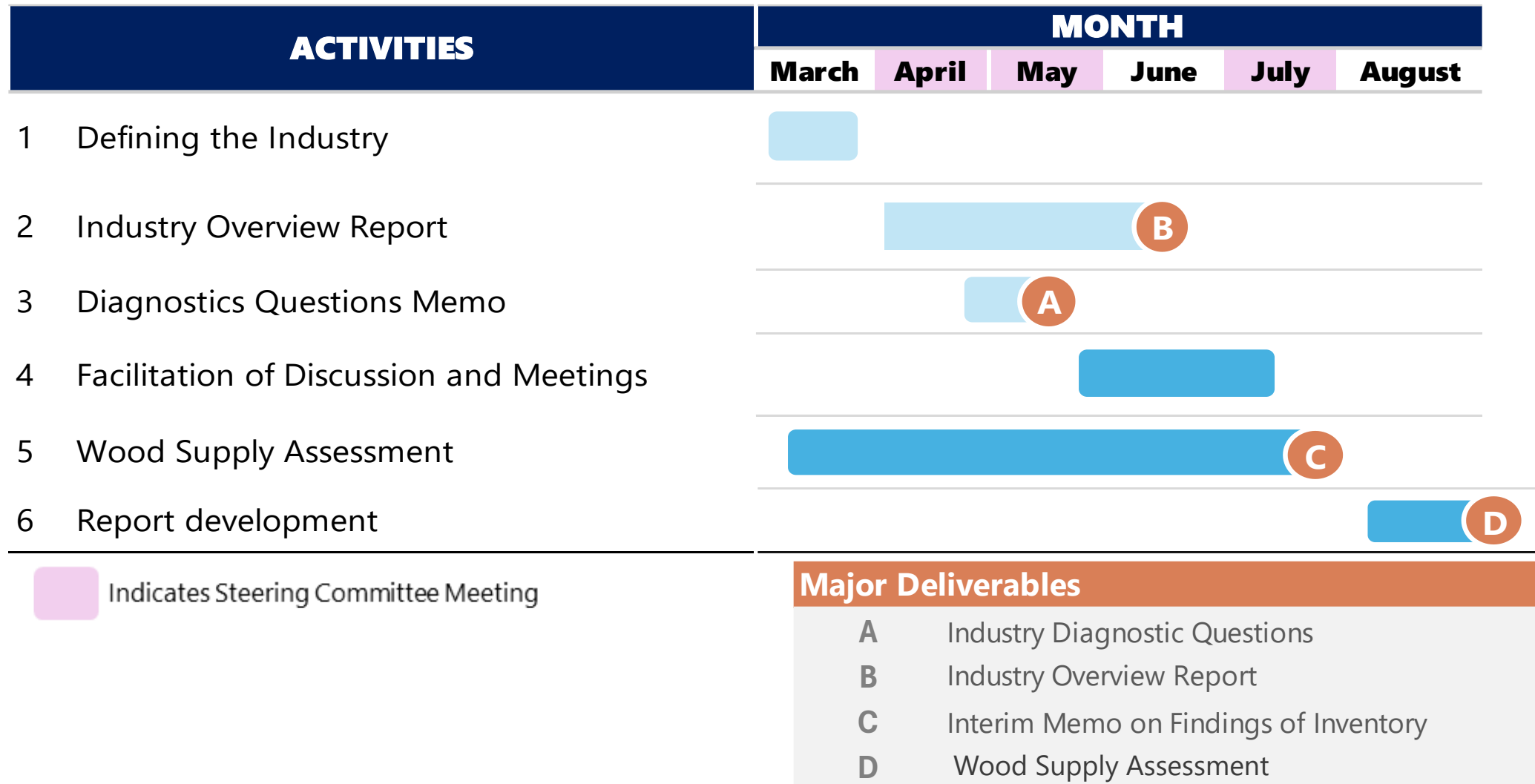


Schedule the next SC meeting for July



Return to CoF for update in September

Research Component #1 Timeline



Discussion



Questions