

Forestry Report

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Housing On The Rise!

By Marshall Thomas, President of F&W Forestry Services, Inc.



It looks like a trend is emerging in the housing market! Housing starts increased in November, continuing a slow but steady rise that began in September.

The better way to look at it is by examining the two price plateaus that occurred this year. In the early part of the year, January through April, F&W's Lumber-Use Adjusted Housing Starts ranged from 1.025 to 1.07 million, annualized. After taking a big jump in May, starts dropped back down, but not to the earlier levels. In the latter part of the year, adjusted starts ranged from 1.09 to 1.31 million.

The F&W-adjusted starts factor in the different lumber usage in single-family homes vs. multiple-family buildings, which is necessary for long-term comparisons. During the boom period of 1994 to 2006, adjusted starts were in excess of 1.2 million. We find ourselves back in that range, with November adjusted starts surpassing 1.31 million. Watch this number. If it stays above 1.2 million for several months, we could start to see demand impact timber stumpage prices.

Of course, interest rates need to continue to decline for that to happen, but the good news is that the Federal Reserve is signaling stable to dropping rates through 2024. And we probably need to tweak the adjusted starts amount to account for sawmill efficiencies that have occurred since the early 2000's, but nonetheless, this is a good indicator.

Investment managers like to tout timberland's lack of

**2023 HOUSING STARTS &
F&W'S LUMBER-USE ADJUSTED HOUSING STARTS**



correlation to other markets, and recent years bear that out. While the real estate market has been depressed due to high interest rates and stock market volatility, timberland has been steadily increasing in price. See the article on page 6.

On the political front, the European Union passed a deforestation-free policy in June which may cause problems for U.S. wood exporters, manufacturers, and producers. The final regulations will be published later this year, but early signs indicate that exporters of wood and wood products to Europe may have to show the geographic locations and management history of all the sites from which wood was harvested to produce their product. The U.S. has almost nothing in place to do that. Our mills are large and tend to aggregate wood from many sources before processing, which will create issues with source tracking. And pulp and paper manufacturers rely

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Wessell Report On Forestry

Tao Wei



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