

Mid-south Projections: expectations for change

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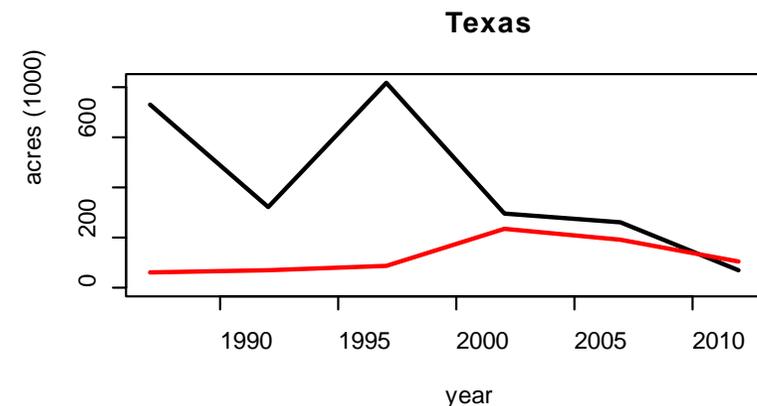
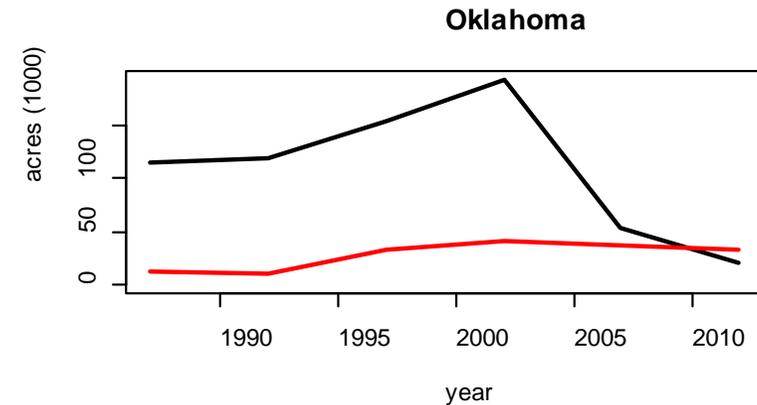
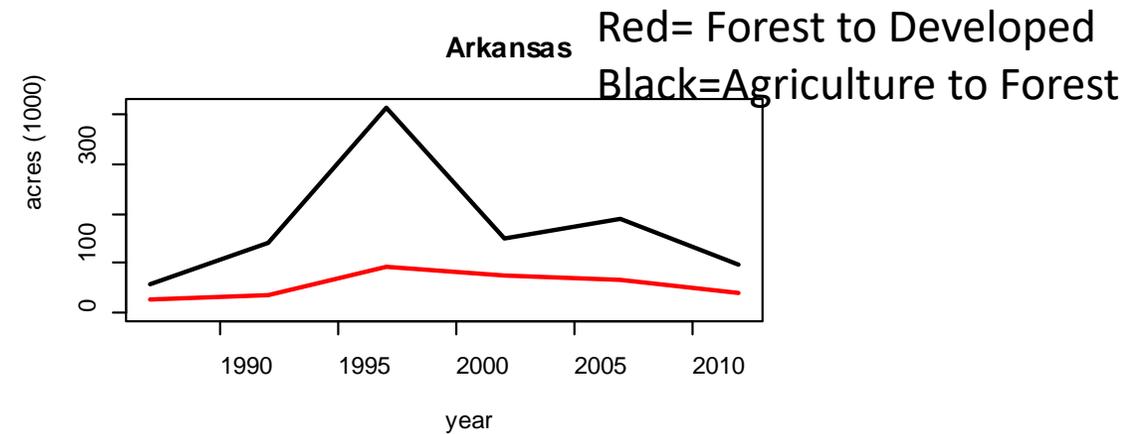
Topics

- Note some key points on a set of related topics:
 - Land use change
 - Expected population change
 - Timber products and prices

Land Use Change

- Increasing timberland area in all states.
- Increase primarily from agriculture but rates decreasing
- Increase in developed land
- In Texas and Oklahoma the amount of agriculture land converting to timberland is less then the amount of timberland concerting to developed uses
- Juniper expansion in west covered in next talk

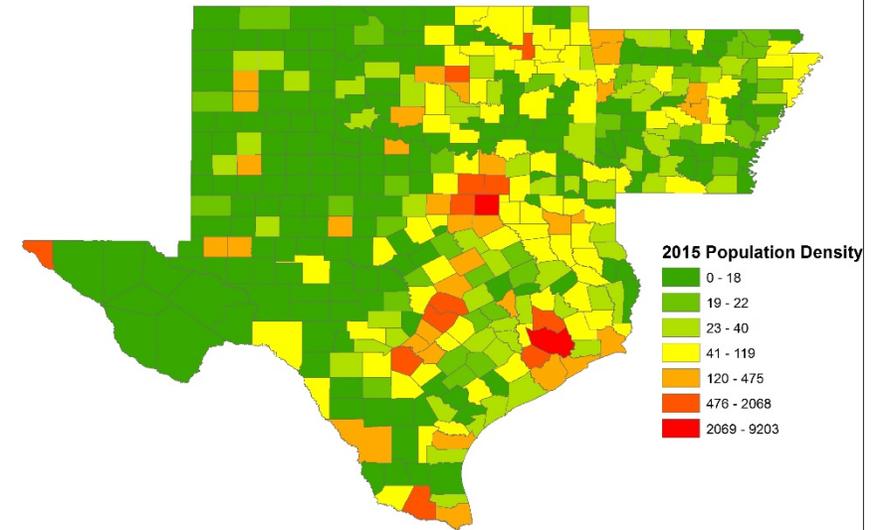
Data source: NRI



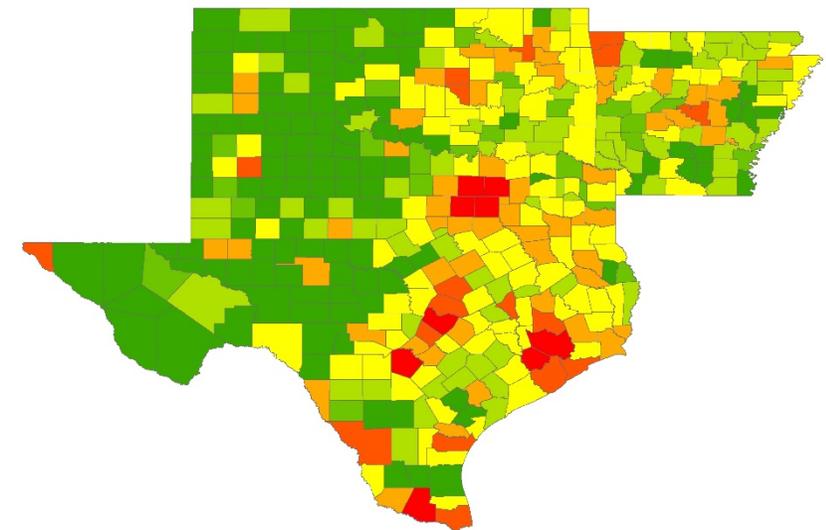
Population

- Population density expected to increase under SSP 5 (highest population growth scenario)
- Under SSP 5 scenario major urban centers expand
 - OK City
 - Dallas
 - Austin
 - Houston
 - San Antonio
 - Little Rock
- Population density expected to increase in timber producing regions.

2015 population density

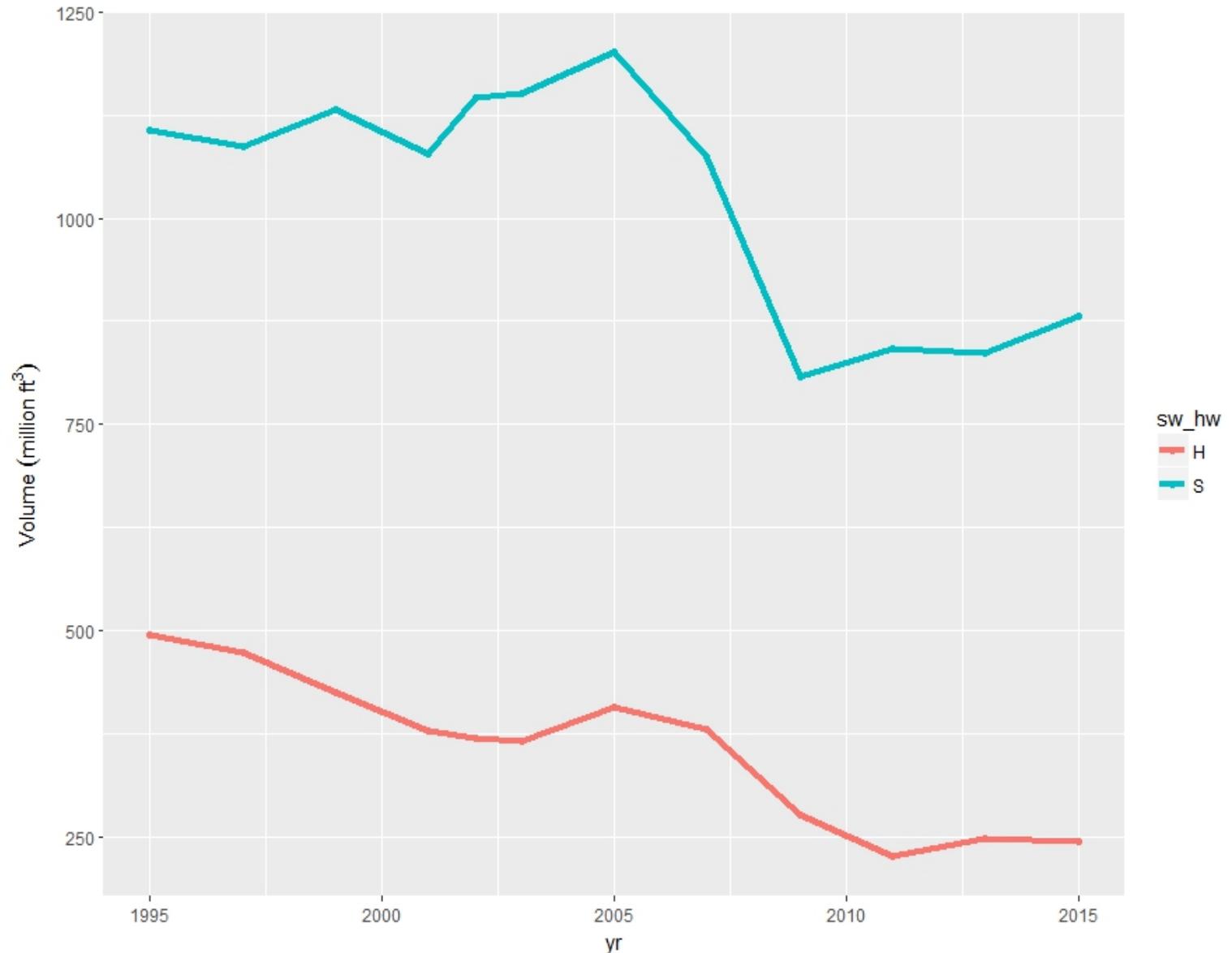


2070 population density (ssp5)



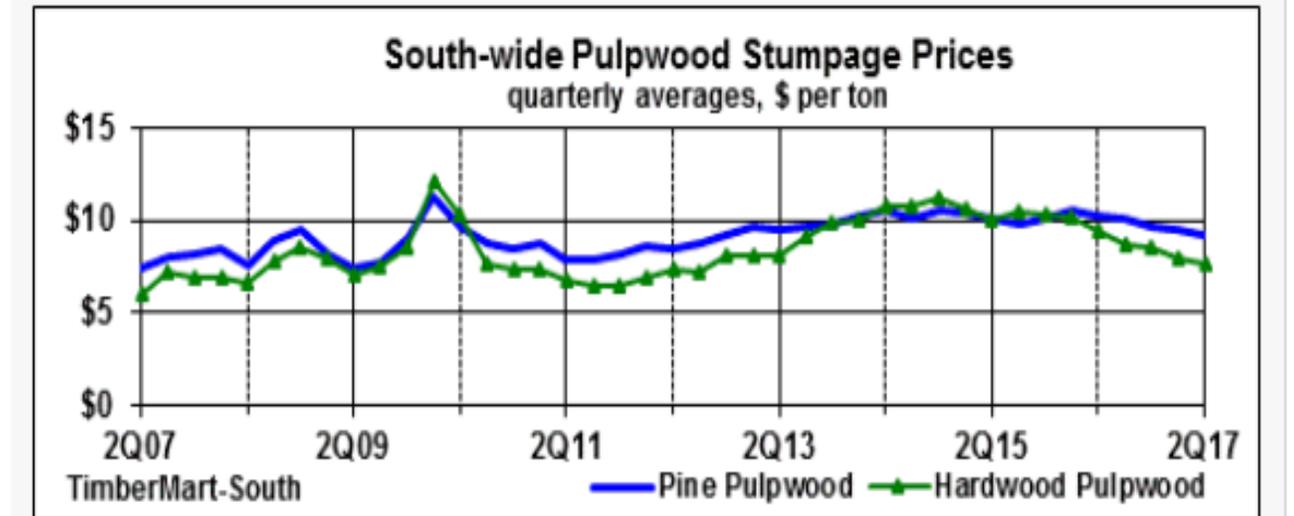
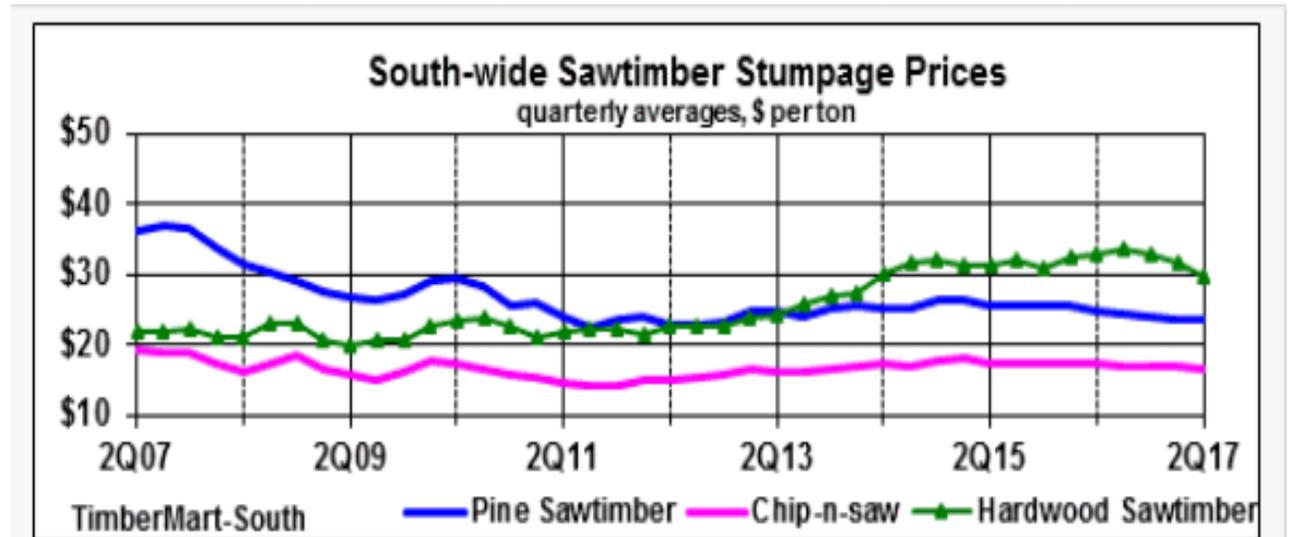
Timber products

- Total production is generally increasing across AR, OK, and TX
- Sawlog production 2013-2015
 - Softwood increased for AR and OK
 - Hardwood decreased for all states
 - Still below pre-recession levels
 - Potential building of sawtimber stocks
- Slight decrease in combined pulpwood in AR and TX (2013-2015)
- Increases observed in veneer logs and other industrial roundwood.



Timber Prices

- Hardwood sawtimber prices have risen
- Pine sawtimber prices have remained low.
- Pulpwood prices declining slightly since 2015



Key points

- Conversions from agriculture to timberland are slowing while development pressure on forest increases
- Population density expected to expand particularly in urban corridors (high population scenario).
- Timber production has increased over pre-recession levels however inventory outpacing increased demand.
- Timber prices have rebounded for some products but pine sawtimber prices continue to remain low.