



## Strategic Wood Supply Analysis

With 140 years' experience in forest inventory and mapping, and industry-leading capabilities in geospatial analysis for natural resources and forest land valuation, Sewall has built a strong professional practice in Strategic Wood Supply Analysis.

Since 2014 Sewall has completed 40 separate projects for the full range of wood-using industries including pulp and paper, lumber, engineered board products, wood pellets, biofuels, bioplastics, and biomass power generation.

We recognize that each stage of a project has a different set of needs with respect to wood supply analysis and our services are customized to those needs, often in a stepwise manner. Early stages include *screening* studies answering the question: Which locations offer feasible wood supplies? Also in early stages are "*gating*" tasks to determine if a particular wood basin can support a new consumer sustainably.

In later stages, more comprehensive studies assess the standing timber resources in more detail, including trends and projections of how they will develop under different consumption scenarios. We look at competition in detail and suggest how the procurement system can be optimized. If sawmill residuals are included, we examine their production, consumption, and pricing.

If the project requires more precise location of certain timber resources by species group or stage of growth (age class), Sewall can apply satellite remote sensing data and models to fill in the gaps left by the nation's low intensity forest sampling program.

Finally, many of the wood supply analysis projects conclude with a detailed estimate of the portfolio of wood sources that will best serve the mill and a build-up of the likely costs based on everything that was learned about the wood basin in each stage of analysis. The wood cost model then typically serves as a key component of the business model for the project stakeholders.

To learn more about Sewall's Wood Supply practice, contact:

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**Strategic Wood Supply Analysis/Due Diligence Engagements - Sewall**

#	Project Type	Location	Year	Client	Notes
40	Oriented Strand Board	Lake States	2020	(confidential)	Phase 4 search for candidate mill sites
39	Pulp and Paper	Wisconsin	2020	(confidential)	Potential acquisition
38	Oriented Strand Board	Lake States	2020	(confidential)	Phase 3 detailed with modeling and site criteria
37	Pulp and Paper	Arkansas/Louisiana	2019	(confidential)	Decisions regarding satellite chip mills
36	Pulp and Paper	Maine	2019	Pixelle	Due diligence for acquisition of Androscoggin mill
35	Pulp and Paper	Maine	2019	(confidential)	Pulpwood consumption and pricing statewide
34	Southern Pine Sawmill	Alabama/Mississippi	2019	(confidential)	Possible greenfield mill
33	Oriented Strand Board	Lake States	2019	(confidential)	Possible greenfield mill
32	Pulp and Paper	Ohio/Pennsylvania	2019	Pixelle	Strategic review 2 mills after ownership change
31	Export Pellets	Texas	2019	(confidential)	Idled pellet mill potential acquisition
30	Oriented Strand Board	US & Canada	2019	(confidential)	Screening study to find candidate locations
29	Export Pellets	Georgia	2019	(confidential)	Existing pellet mill potential acquisition
28	Statewide supply and wood cost	Maine	2018	FORMaine Project	<a href="#">Link to reports</a>
27	Export Pellets	Maine	2018	(confidential)	Possible greenfield
26	Oriented Strand Board	Maine	2018	(confidential)	Possible greenfield
25	Pulp and Paper	Maine	2018	(confidential)	Possible greenfield
24	Pulp and Paper	Maine	2018	(confidential)	Possible significant expansion
23	Large Landholding Portfolio	Maine	2017	(confidential)	Markets, supply and demand, pricing for pulpwood
22	Combined Heat and Power (CHP)	Maine	2017	(confidential)	Possible large-scale CHP
21	Combined Heat and Power (CHP)	New Hampshire	2017	(confidential)	Possible medium-scale CHP
20	Oriented Strand Board	Maine	2017	Huber Engineered Woods	Emphasis on aspen long-term supply
19	Pulp and Paper	Arkansas	2017	Evergreen Packaging	Impact of significant new competitors
18	Pulp and Paper	North Carolina	2017	Evergreen Packaging	Emphasis on pine strategy
17	Biofuels from Wood	Louisiana	2016	(confidential)	In-depth look at one possible site
16	Bioplastics from Wood	U.S. South	2016	(confidential)	Comparison of a small number of sites
15	Home-heating Pellet	Maine	2016	(confidential)	Possible greenfield
14	Export Pellets	New Brunswick	2016	Northern Energy Systems	Crown Lands supply
13	Southern Pine Sawmill	Arkansas	2016	Blue Wolf Capital Partners	Acquisition / restart of shuttered mill
12	Biofuels from Wood	U.S. South	2015	(confidential)	Screening study across entire south
11	Home-heating Pellet	Maine	2015	Bear Mountain/Lignetics	Acquisition, expansion
10	Export Pellets	Alabama	2015	Green Circle BioEnergy	In-depth look at one possible site
9	Oriented Strand Board	Tennessee	2015	Huber Engineered Woods	Restart of shuttered mill
8	Oriented Strand Board	U.S. South	2015	(confidential)	Screening study for resource conditions across the south
7	Pulp and Paper	Alabama	2015	MeadWestvaco	Includes a sawmill
6	Specialty Building Product	Lake States	2015	(confidential)	Screening study for a new aspen-dependent mill
5	Biomass Energy / Sawmill	Florida	2014	(confidential)	Proposal to co-locate sawmill with existing biomass power
4	Export Pellets	Florida	2014	Green Circle BioEnergy	Three potential greenfield locations
3	Export Pellets	Maine	2014	(confidential)	Greenfield proposal (eastern region)
2	Pulp and Paper	Ohio	2014	Glatfelter	Emphasis on pine strategy
1	Southern Pine Sawmill	Florida	2014	Blue Wolf Capital Partners	Acquisition

