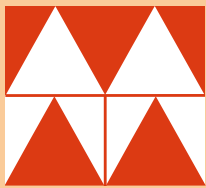




NORTH AMERICA SAWMILL LOOKOUT: UPDATE OCTOBER 2025

Company name	Type	Location	ACTUAL	ESTIMATE	Timeline	Reasons
Interfor	Mill	Gogama, ON		-25 employees	2 weeks	Two-week curtailment; upon return will cut manufacturing by half.
Domtar	Pulp & Paper	Meadow Lake, SK			None	Total loss of log pile (approx. 100,000 m3); mill operation not impacted.
Mercer Mass Timber	Mass Timber	Spokane Valley, WA		+50 employees	Oct-25	US\$30 million investment to install assembly line infrastructure.
Southeastern Timber Products	Mill	Ackerman, MS	+120 MMfbm	+40 employees	Oct-25	US\$123.4 million sawmill upgrade complete.
Sinclar Group Forest Products	Mill	Various, BC	-100 MMfbm	-40%	4Q 2025	Curtailment due to provincial policy landscape, persistent uncertainty around fibre supply.
BMI Group	Pulp & Paper	Espanola, ON			Oct-25	Purchase of former Domtar mill site completed; launch of bio-based energy facility.
Schmidt Lumber Company	Mill	Tennessee Ridge, TN			Oct-25	Sawmill destroyed by high winds blowing sparks from saw dust pile burning.
International Paper	Pulp & Paper	CA, OR, TX			Oct-25	Bag converting operations sold to ProAmpac.
Interfor	Mill	Various	-250 MMfbm	-26%	4Q 2025	Response to persistently weak market conditions and ongoing economic uncertainty.
Drax	Pellets	Leola, Russellville, AR	-80,000 tonnes (combined)	-16 employees	1-Nov	Cease operations and idle facilities.
Van Urban Timber	Mill	Squamish, BC			7-Oct	New building to replace the existing smaller sawmill.

Note: Panel Mills are measured in MMs² (millions of square feet). Lumber Mills are measured in MMfbm (millions of board feet). Panel volume depends on size, typically it's 3/8", may be 7/16".



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Company name	Type	Location	ACTUAL	ESTIMATE	Timeline	Reasons
Daiken North America	Panel Mill	Huntsville, ON		+10 employees	Oct-25	\$70 million investment to upgrade laminated board production line.
Pixelle Specialty Solutions	Pulp & Paper	Chillicothe, OH		-80 employees	Oct-25	Completed sale to U.S. Paper Mill, LLC.
Interfor	Mill	Grand Forks, BC			6-Oct	Indefinitely idled due to weak market conditions and higher US softwood lumber duties.
GreenFirst Forest Products	Mill	Kapuskasing, Hearst, Cochrane, ON		140 employees	6-Oct	Restart after one-week curtailment.
Kruger	Containerboard	Trois-Rivières, QC			1Q 2026	\$16 million to consolidate fibre collection and storage operations.
SWS Sawmill	Mill	Vicksburg, MI			Oct-25	20-year-old employee fell into an operating saw, lost left arm.
Landforce	Mill	Pittsburgh, PA			Oct-25	Facility reclaims fallen or salvaged urban trees and repurposes into high-quality lumber, pallets.
AHC Hardwood Group / Lunawood	Mill (HW)	Cleveland, GA			Oct-25	Grand opening of premium hardwood façades, decking, and interiors production facility.

Note: Panel Mills are measured in MMsf (millions of square feet). Lumber Mills are measured in MMfbm (millions of board feet). Panel volume depends on size, typically it's 3/8", may be 7/16".

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Company name	Type	Location	ACTUAL	ESTIMATE	Timeline	Reasons
Tolko Industries / Hunt Forest Products	Mill	Bienville Parish, PA	+320 MMfbm	+190 employees	Oct-25	Dedicated new US\$280 million sawmill.
GreenFirst Forest Products	Mill	Kapuskasing, Hearst, Cochrane, ON	-9.4 MMfbm (combined)	-140 employees	30-Sep	Curtailment for one week due to broader industry conditions, elevated duties & tariffs.
Irving Pulp & Paper	Pulp & Paper	Saint John, NB		+600 employees	Oct-25	\$660 million for large-scale modernization; new recovery boiler, steam turbine, and generator.
Roseburg Forest Products	Panel Mill (HW)	Dillard, OR		-107 employees	Oct-25	Location to cease operations, company will exit the hardwood plywood market.
Aspen Planers	Panel Mill	Merritt, Lillooet, BC	-30 MMfbm	-260 employees	Unknown	Indefinite curtailment due to lack of logs and rising costs.
Interfor	Engineered Wood	Sault Ste. Marie, ON		+12%	Oct-25	\$5 million in funding to upgrade equipment and adopt new technologies.

Note: Panel Mills are measured in MMsf (millions of square feet). Lumber Mills are measured in MMfbm (millions of board feet). Panel volume depends on size, typically it's 3/8", may be 7/16".

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SAWMILL PRODUCTION VOLUMES

Producing 0 – 300 MMfbm per year

Interfor – Grand Forks, BC
Landforce – Pittsburgh, PA

Producing over 600 MMfbm per year

Aspen Planers – Merritt, Lillooet, BC
GreenFirst Forest Products – Kapuskasing, Hearst, Cochrane, ON
Sinclar Group Forest Products – Various, BC
Tolko Industries / Hunt Forest Products – Bienville Parish, PA

Producing 0 - 300 MMsf per year

Southeastern Timber Products – Ackerman, MS

Producing 0 – 1 MM tonnes per year

Domtar – Meadow Lake, SK
Drax – Leola, Russellville, AR
Irving Pulp & Paper – Saint John, NB
Kruger – Trois-Rivières, QC

Producing over 100 m3 per year

Mercer Mass Timber – Spokane Valley, WA

Producing over 1 billion board feet per year

Interfor – Various

MADISON'S SAWMILL LOOKOUT

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PO Box 2486
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Annual Subscription **US\$1,289**
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COMPANY NEWS

October 28

[USDA Announces Plan to Increase Exports, Advance Rural Prosperity](#)

The USDA's new plan has authorized US\$285 million annually for trade promotion programs beginning in fiscal year 2027 in a three-point plan which aims to increase exports, advance rural prosperity, and reduce the trade deficit in line with its trade and foreign affairs agenda. Southern Forest Products Association Executive Director Eric Gee said the USDA's initiatives align directly with SFPA's goals to expand market access for Southern pine lumber, reduce trade barriers, and strengthen rural economies.

SOURCE: SFPA

October 22

[New Michigan Mass Timber Catalyst Program](#)

The Michigan Mass Timber Catalyst Program is designed to spur interest in building with

mass timber – sustainable, large, engineered wood beams and panels used to create a range of buildings, even skyscrapers. The new program will encourage mass timber construction with cash awards, technical assistance, and a dynamic, peer-learning community to help work through challenges commonly faced by early adopters.

SOURCE: Government Press Release

October 20

[Tariffs on Wood Products Not Helping Wisconsin Producers](#)

Krueger Lumber out of Valders in northeast Wisconsin, said with tariffs in place on lumber imported to the United States, other countries have responded with reciprocal tariffs. This has led to an excess of lumber in Wisconsin, with fewer places to sell it to. Krueger logs and processes mainly hardwoods, which are used to make flooring, furniture, and cabinets, among other things.

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COMPANY NEWS CONT'D

Krueger immediately saw effects of the tariff war in the spring. The company had three shipping containers on their way to China when the customer cancelled their order.

SOURCE: Urban Milwaukee

[Senate committee advances Fix Our Forests Act](#)

The U.S. Senate Committee on Agriculture, Nutrition, and Forestry has approved the Fix Our Forests Act. This bipartisan legislation aims to reduce the frequency and severity of catastrophic wildfires, expedite forest management projects, and address legal and regulatory barriers to timely wildfire response. The bill includes measures to designate firehatched management areas, increase the use of prescribed burns, and expand Good Neighbour Authority agreements to Special Districts.

SOURCE: PulpPaper News

[Georgia-Pacific to close Memphis Cellulose mill](#)

Georgia-Pacific will permanently close the Memphis Cellulose mill and the Memphis Technology and Innovation Center in Tennessee. The Memphis Cellulose plant produces cotton linter pulp, which is used for a wide variety of products requiring high purity cellulose as a raw material. End uses include specialty plastics, paints and coatings, and specialty papers used in the medical, artist, and filtration industries.

The closures impact approximately 130 employees at the cellulose mill, and 22 employees at the Technology and Innovation Center.

SOURCE: HBS Dealer

October 17

[Sawmill To Pay US\\$574,000 under Clean Water Act](#)

A sawmill in Washington State has agreed to pay US\$574,000 to settle an environmental lawsuit

alleging Clean Water Act violations, but continues to deny any wrongdoing. A federal judge has signed off on a consent decree between the Sierra Pacific Industries facility in Aberdeen, WA, and the Twin Harbors Waterkeeper nonprofit, bringing an end to the litigation.

Twin Harbors Waterkeeper filed a federal complaint against Sierra Pacific Industries last year, claiming that contaminated runoff from the facility violated stormwater quality standards. According to the complaint, polluted stormwater from the sawmill had caused “ecological impacts” by flowing into the Chehalis River and then Grays Harbor, breaching the facility’s Clean Water Act permit.

SOURCE: Capital Press

[U.S. Endowment for Forestry and Communities Administers Wood Innovation Grants](#)

The U.S. Endowment for Forestry and Communities is highlighting one of its partner programs that supports and advances U.S.-based manufacturing. The Endowment is administering US\$5 million of the USDA Forest Service’s US\$80 million Wood Innovation Grants program, overseeing 18 individual projects across the country. Each project includes matching funds from subaward recipients, resulting in a total impact of approximately US\$10 million. Together, these investments will advance wood product manufacturing, strengthen forest management and foster energy innovation for timber-producing communities.

The Wood Innovation Grants are part of a broader USDA strategy to expand timber markets, support rural economies, and enhance forest productivity and resilience.

SOURCE: US Forest Service

[SFPA Joins U.S. Forest Products Industry in Support of EUDR Simplification](#)

As the European Commission prepares a further postponement of its Deforestation-free Regulation (EUDR), proposals to simplify the law are abundant in Brussels. The U.S. forestry and forest products sector urges the Commission to avoid a rushed process and take the time necessary to pursue simplification with great care. An additional year provides a valuable opportunity for the Commission to engage in productive dialogue with forest owners and operators in highly forested, low-risk countries like the U.S. to understand implementation challenges and reduce unintended consequences.

SOURCE: Southern Forest Products Association

[Ontario Invests \\$16.8 million to Support Kapuskasing Paper Mill](#)

The Ontario government is allocating \$16.8 million to sustain operations at the Kapuskasing Paper Mill, securing nearly 300 mill jobs and supporting 2,500 direct and indirect forestry positions across northeastern Ontario. The provincial investment follows discussions with Kap Paper and the federal government, which has committed an additional \$12 million, according to the Ministry of Natural Resources.

Ontario initiated multi-level talks to address the company’s financial challenges and the broader impact of U.S. softwood lumber tariffs on the regional forestry sector. The joint funding is intended to maintain current operations while the company works on long-term plans to modernize production and diversify its product line.

SOURCE: Government Press Release

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COMPANY NEWS CONT'D

October 14

[Rayonier and PotlatchDeltic Merge](#)

Rayonier and PotlatchDeltic have agreed to merge in an all-stock transaction that values the combined enterprise at US\$8.2 billion. The deal will create a diversified land resources REIT with 4.2 million acres of timberland, including 3.2 million acres in the U.S. South and 931 thousand acres in the Pacific Northwest.

The combined company will become the second-largest in the sector, the top U.S. timber REIT, and largest private landowner, with more than 10 million acres and a market value exceeding US\$17 billion. The merger will consolidate seven wood products facilities with a total capacity of 1.2 billion board feet of lumber and 150 million square feet of plywood.

SOURCE: Reuters

October 6

[Cascades Announces the Sale of its Flexible Packaging Plant](#)

Cascades has reached an agreement to sell its Flexible Packaging plant activities to Five Star Holding based in Houston, TX. The \$31 million transaction is effective immediately. Cascades' will retain ownership of the site real estate. Located in Mississauga, Ontario, Flexible Packaging is Cascades' only plant that manufactures printed flexible plastic packaging and films.

SOURCE: The Globe and Mail

[Weyerhaeuser to Invest in West Virginia Community](#)

Weyerhaeuser Company announced a commitment to invest \$1 million in Buckhannon, West Virginia, through the company's THRIVE program. The investment will be made over the next several years with input from local

elected officials, business leaders, nonprofits, employees and other community partners. Weyerhaeuser launched THRIVE in 2023 to provide targeted assistance to five of its rural operating communities; Buckhannon is the third community to be selected for the program. Weyerhaeuser's THRIVE program is a key pillar of the company's broader 3 by 30 Sustainability Ambition around rural communities.

SOURCE: Company Press Release

October 1

[Greif Completes Sale of Timberlands Business](#)

Greif announced that it has completed the previously announced sale of its timberlands business to Molpus Woodlands Group, on behalf of clients, for approximately US\$462 million after adjustments. The Molpus Woodlands Group purchased approximately 173,000 acres of timberland in Alabama, Louisiana, and Mississippi combined.

SOURCE: Building Products Digest

[Pregis Opens New Paper Converting Centre](#)

Pregis opened a new 477,000-square-foot paper converting centre in Elgin, Illinois. The facility will support over 500 manufacturing jobs and can produce more than 1 billion curbside recyclable paper packaging solutions annually. The zero-waste production complex, powered entirely by renewable energy through Renewable Energy Credits, will host multiple production lines for the company's protective paper and mailing solutions offering. The facility is expected to divert an estimated 33,000 tons of waste from landfills as brands transition from plastic alternatives.

SOURCE: Packaging Dive

September 30

[Stella-Jones to Acquire Assets of Brooks Manufacturing](#)

Stella-Jones has entered into a definitive agreement to acquire the assets of Brooks Manufacturing, a manufacturer of treated wood distribution crossarms and transmission framing components. This US\$140 million transaction marks another significant step in the Company's strategy to expand beyond its traditional product categories and leverage its extensive sales and distribution network to better support the needs of the utility sector. The definitive agreement is subject to customary working capital adjustments.

SOURCE: WoodWorking Network

September 29

[White House Imposes 10% Tariff on Lumber Imports](#)

President Donald J. Trump has imposed a 10% ad valorem tariff on softwood lumber imports and a 25% tariff on kitchen cabinets, vanities, and certain upholstered wooden furniture under a new proclamation issued on September 29. These measures follow a Section 232 investigation by the Department of Commerce, which determined that current import levels of wood products could threaten to impair national security, according to the White House. The 25% tariffs on upholstered wooden furniture and kitchen cabinets will increase on January 1, 2026, to 30% and 50% respectively. The new tariffs take effect October 14, 2025, and apply to products listed in Annex I of the proclamation.

SOURCE: CNN

[Wildfires Cut Douglas-fir Land Value in Oregon by Half](#)

Douglas-fir plantations in Western Oregon face sharp economic impacts from rising wildfire risk, with land expectation values dropping by

MADISON'S MONTHLY SAWMILL LOOKOUT

COMPANY NEWS CONT'D

50%, from US\$14,104 to US\$6,414 per hectare, when wildfire probability increases to 0.04. The optimal harvest age in these high-risk conditions falls from 65 years to just 24 years, as forest managers prioritize early cutting to avoid losses. These results stem from a reservation price model that integrates wildfire probability, timber price volatility, and carbon sequestration economics, according to researchers at Oregon State University. At moderate wildfire risk ($\lambda = 0.02$), land values fall to between US\$8,990 and US\$9,404 per hectare, with optimal harvest ages decreasing to around 40 years.

SOURCE: ScienceDirect

September 25

[EU Plans Second One-Year Delay to Anti-Deforestation Law](#)

The European Commission plans to delay enforcement of the EU Deforestation Regulation (EUDR) by one year, pushing the compliance deadline from 30 December 2025 to 2026. This marks the second planned postponement of the law, which was originally scheduled to take effect in 2024, as EU Environment Commissioner Jessika Roswall cites unresolved issues with the IT system managing compliance data. The regulation requires companies importing palm oil, coffee, cocoa, cattle, timber, and rubber into the EU to prove that these goods were not produced on deforested land.

SOURCE: World Resources Institute

[U.S. Federal Timber Sales Up 5% in 2025](#)

Timber sales on U.S. federal lands have increased only modestly in fiscal 2025, complicating efforts by the Trump administration to sharply expand logging. Weak demand, litigation, and capacity

constraints threaten to stall the broader push. Timber sales by the Bureau of Land Management have risen 4.6% so far this year compared to all of fiscal 2024, and U.S. Forest Service sales increased 12.5% in the first three quarters of 2025, with more federal sales expected through September.

SOURCE: Lesprom

[USDA Invests in 58 Community Projects to Reduce Wildfire Risk](#)

U.S. Secretary of Agriculture Brooke L. Rollins announced the USDA Forest Service is investing US\$200 million in 58 projects through the Community Wildfire Defense Grant Program. These investments help at-risk communities plan for and reduce wildfire risk, protecting homes, businesses, and infrastructure. The selected projects span 22 states and two tribes, supporting efforts to develop or update their community wildfire protection plans and carry out projects to remove hazardous or overgrown vegetation that can fuel fires that threaten lives, livelihoods, and resources.

SOURCE: Government Press Release

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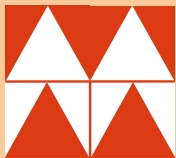
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