

# THE NEW ZEALAND FOREST PRODUCTS INDUSTRY DATABASE REVIEW 2016

## 10<sup>th</sup> Edition



Rotorua based Red Stag sawmill being constructed in 2016. USNR equipment.  
Note the use of NZ Radiata pine Engineered Wood Products in the 110 metre long sawmill building

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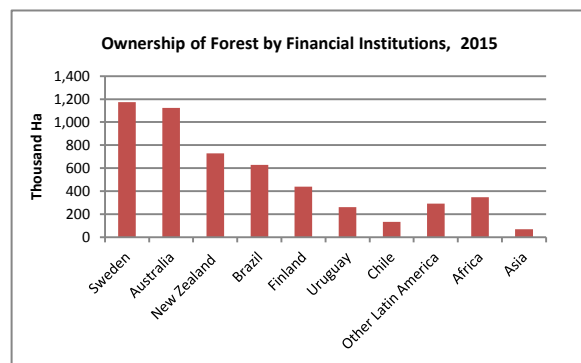
The 2016 edition of “*The New Zealand Forest Products Industry Review*” is the **10th produced by DANA Publishing**.

This Review has become an important tool for everyone involved/interested in the N.Z. forestry and forest products industry. Earlier editions had been mostly text and were 175-200 pages. This edition includes some database summaries and profiles and is therefore only **120 pages**; and provides **70 tables and charts**. The review profiles **45 plantation forest owners** (from 3,000 ha to 200,000 ha), together with **55 sawmills**; and all engineered wood products and pulp and paper facilities.

Most New Zealand "industrial" forests now have overseas owners: TIMOs, REITS, Funds, Companies and Family Offices. New entrants include Chinese companies. International forest bids in 2015 have continued to stun observers. Why NZ?

Invested (Selection)	Invested (Selection)
Global Forest Partners	Sumitomo Forestry
GMO RR	Ernslaw One
Rayonier	Samling
Greenheart (New Forest)	Monte Capital
HTRG	Juken NZ
Phaunos Timber Fund	Ngai Tahu Property
Blakely Pacific	Wenita
New Forests	Sunchang Corp
NZ Forestry Co.	NZ Redwood Co.
Corisol	Forest Enterprises

After Sweden and Australia, New Zealand is the most popular (non- USA) institutional forest investment haven.



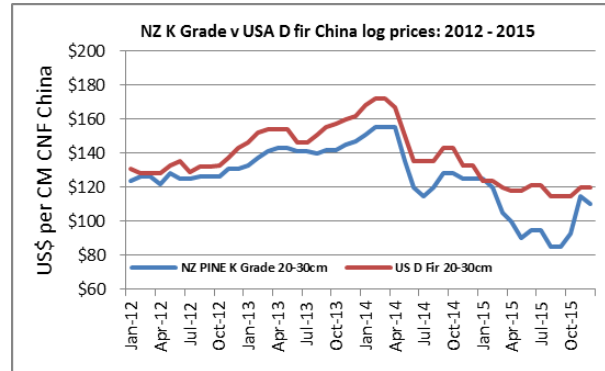
## Review Chapters

<b>Introduction:</b>	Summary, Forward Strategies, Statistics, NZ investment attractiveness
<b>Planting History:</b>	Long term: Government and private. Land use balance
<b>Forest Resources:</b>	2015 Regional Harvest predictions [those available] 2014-2050. DANA national projection
<b>Forest Ownership:</b>	All forest and forest land OIO permits from 2009 to late 2015 Profiles of forest owners.
<b>Log and Woodchips:</b>	Production - trade - log price trends – woodchips trade
<b>Pulp and Paper:</b>	Production - trade. Profiles of all players. NZ's place
<b>Solidwood Products:</b>	Production - trade. Mills closed. North and South Island sawmill profiles. Add value profiles
<b>EWP:</b>	Production - trade: Plywood - Veneer - LVL - MDF – PP - CLT - Pellets – Rosin – OEL - AC
<b>Conclusions:</b>	DANA's take on major strategic and operating issues and where to from here

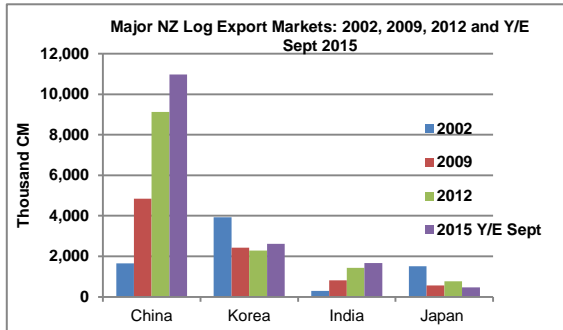
LumberCube in Rotorua CNI has just commenced operating the largest log processing mill in the Southern Hemisphere, producing “square logs”. Will they be more attractive in China than raw logs? You be the judge.



Export and domestic log, and woodchip price trends are charted. NZ logs in China track USA Douglas fir but price relationship is volatile.



Every forest owner just loves China. But is N.Z. too exposed to one log market? What is likely to happen?



Where else on the world can you find 20 year old pine trees that look like this?

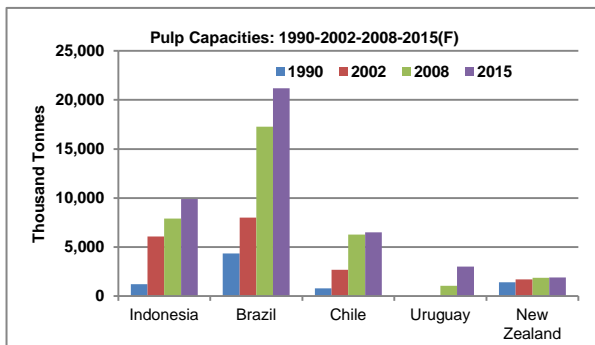


**About the Author:**

**Mr Dennis Neilson** is a Director of the New Zealand- based international forestry and forest industry information firm, DANA Limited. DANA has undertaken resources, strategic planning, investment and marketing assignments for several NZ and international clients.

DANA has also authored/co-authored/published more than 60 multi-client reviews on forestry and forest products topics. It organises several international conferences and industry tours each year.

International MDF and pulp capacity increases. While several countries have booming and expanding MDF and pulp industries, N.Z. has stagnated over the last 20 years. Why?



**Cross Laminated Timber [CLT]:** The sizzle Engineered Wood Product of 2015. Who is a New Zealand world leader in its manufacture?



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