

Global Pulpwood Logs Market Growth 2026-2032

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Abstracts

The global Pulpwood Logs market size is predicted to grow from US\$ 141846 million in 2025 to US\$ 173190 million in 2032; it is expected to grow at a CAGR of 2.8% from 2026 to 2032.

Pulpwood logs refer to roundwood obtained from softwood species (pine, spruce, fir, larch etc.) or hardwood species (eucalyptus, poplar, birch, acacia etc.), typically with small end diameters between 8 and 25 centimeters and lengths between 2.0 and 5.0 meters, after harvesting, debarking and delimbing. They are primarily used for chemical pulping, mechanical pulping or semi-chemical pulping to produce paper pulp, dissolving pulp and specialty fiber products. As the starting point of the global paper industry and forest chemical value chain, this category's supply volume, fiber morphology and raw material uniformity directly influence pulp yield, paper quality and production costs, making it a core intermediate commodity bridging forestry plantations and papermaking. Moreover, pulpwood logs are mostly sourced from purpose-grown plantation forests with short rotations (12-18 years for softwoods, 5-8 years for hardwoods), which supports sustainable intensive forestry and regional rural economies.

Pulpwood logs serve as the core raw material for the paper industry, with prices staying in a low-value range while remaining sensitive to commodity market cycles. In 2025-2026, global softwood pulpwood prices average 100 to 150 US dollars per cubic meter, while hardwood pulpwood averages 80 to 120 US dollars per cubic meter. Radiata pine logs land in South China at about 130 to 140 US dollars per cubic meter, and Brazilian eucalyptus logs (FOB) range from 70 to 90 US dollars per cubic meter. Gross margins diverge sharply by vertical integration: pulp mills with captive plantations maintain 25% to 35% margins, while independent mills relying on external procurement are squeezed to 10% to 15%, and pure pulpwood suppliers often fall below 8%. Downstream consumption is dominated by packaging papers (linerboard and corrugating medium), accounting for roughly 55% of global fiber usage; printing and

writing papers take 20%, tissue 12%, and specialty pulps (dissolving pulp, mechanical pulp, etc.) 13%. Incremental demand comes from three drivers: first, the ongoing expansion of global hardwood pulp capacity ? new eucalyptus pulp capacity in Brazil and Uruguay exceeding 4 million tonnes in 2025?2026 drives nearby pulpwood demand; second, after China?s ban on imported wastepaper, packaging paper mills have shifted to virgin pulp, with Chinese softwood log imports rising 9% year?on?year in the first half of 2026; third, high cotton prices have boosted dissolving pulp substitution in viscose staple fiber, with global dissolving pulp output growing 6% in 2025, lifting premiums for high?alpha?cellulose eucalyptus and birch logs. However, uncertainties and risks remain significant: digitalization cuts newsprint and some graphic paper demand by 3% to 5% annually, compressing the mechanical pulp market; rising energy and freight costs erode low?margin grades; and forestry carbon credit policies are diverting some plantation area from pulpwood to carbon offset projects, potentially raising long?term raw material costs. The competitive landscape is highly concentrated, with the top ten enterprises controlling over 60% of global pulpwood supply, and integrated giants (Suzano, Klabin, UPM, etc.) wielding both pricing power and capacity flexibility. Emerging market players in China and Indonesia are moving upstream, but still lag in captive plantation scale. In summary, pulpwood logs will see moderate growth slightly below global GDP growth; packaging and tissue remain key drivers, with softwood?s long?fiber irreplaceability preserving a structural premium, while hardwood faces more regional overcapacity risk. As the most commodity?like forest product category, profit stability in pulpwood depends heavily on the degree of vertical integration and procurement cost control.

LP Information, Inc. (LPI) ' newest research report, the ?Pulpwood Logs Industry Forecast? looks at past sales and reviews total world Pulpwood Logs sales in 2025, providing a comprehensive analysis by region and market sector of projected Pulpwood Logs sales for 2026 through 2032. With Pulpwood Logs sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Pulpwood Logs industry.

This Insight Report provides a comprehensive analysis of the global Pulpwood Logs landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Pulpwood Logs portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global Pulpwood Logs market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Pulpwood Logs and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Pulpwood Logs.

This report presents a comprehensive overview, market shares, and growth opportunities of Pulpwood Logs market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Softwood for Kraft Pulping (pine, larch, red pine)

Softwood for Mechanical Pulping (spruce, fir)

Hardwood for Kraft Pulping (eucalyptus, birch, acacia)

Hardwood for Dissolving Pulp (eucalyptus, birch)

Hardwood for Semi-Chemical Pulping (poplar, aspen)

Segmentation by Diameter:

Small-diameter (6-16 cm)

Medium-diameter (18-24 cm)

Large-diameter (>26 cm)

Processing Residues & Salvage

Segmentation by Application:

Packaging Paper & Containerboard

Printing & Writing Paper

Tissue Paper

Dissolving Pulp & Specialty Fibers

Paperboard & Molded Pulp

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Suzano

Klabin

Stora Enso

UPM

Sappi

Mets? Group

CMPC

International Paper

Paper Excellence

Canfor

RGE Group

Sveaskog

SCA

Mondi

West Fraser

Smurfit WestRock

Resolute

Holmen

Nine Dragons

Versowood

Sinar Mas

Oji Paper

Nippon Paper

Chenming

Tolko

Ilim Group

Runko Group

Vologda Lesopromyshlenniki

Toba Pulp Lestari

Korintiga Hutani

Albany Plantation Forest Company

Australian Bluegum Plantations

Mercer International

Huachang Group

Sun Paper

S?dra

Key Questions Addressed in this Report

What is the 10-year outlook for the global Pulpwood Logs market?

What factors are driving Pulpwood Logs market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Pulpwood Logs market opportunities vary by end market size?

How does Pulpwood Logs break out by Type, by Application?

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