



# GLOBAL SOFTWOOD LOG & LUMBER CONFERENCE MAY 8-9, 2019



IN CONJUNCTION WITH PULP & PAPER PRODUCERS COUNCIL ANNUAL MEETING: MAY 5-7, 2019

For this year's 2-day event, we have invited 20 industry experts to speak at our global market conference as well as up to a dozen industry experts for the three panel sessions. In the weeks leading up to the May 8-9 conference, we will be sending regular news bulletins introducing speakers as well as our conference sponsors. Each week selected speakers will be featured in our "conference preview" including biographies and presentation outlines.

## **SESSION 3. NO. AFRICA/SOUTH AMERICA TOPIC: Uruguay: Log & Lumber Outlook**



**Francisco Bonino**  
**Director**  
**AF Group, Uruguay**

Francisco Bonino is the founder and director of AF Group, a forestry investment management company with US\$350 million of assets. Francisco has 19 years of timber experience in Uruguay, Argentina, Brazil and Chile. In the past he was responsible for product development for Monsanto in northern Argentina, Bolivia and Paraguay. He graduated as Agronomic Engineering from UDELAR (Uruguay's National University) and he holds an MBA from the New York Institute of Technology.

AF teams are based in Brazil, Uruguay and Chile, from where it exports eucalyptus and some pine logs to more than 40 Asian clients in Vietnam, China, South Korea, Japan, Malaysia, the Philippines, Indonesia and India, among others.

Francisco will address the status of log and lumber exports from Uruguay and will explain why Uruguay is source of further log and lumber exports as well as an opportunity for investment.

**SESSION 7. DEEP DIVE: BC Interior, BC Coast & US PNW**  
**TOPIC: BC Coast Forest Sector Revitalization**



**John Allan**  
**Deputy Minister**  
**BC Ministry of Forests, Lands, Natural Resource Operations and Rural Development (FLNRORD), Canada**

John Allan was appointed Deputy Minister of the Ministry of Forests, Lands, Natural Resource Operations and Rural Development (FLNRORD) in September 2018. John has a long history in resource management, including 22 years with the Government of British Columbia from 1977 to 1999. Following the public service, John was President and CEO of the BC Council of Forest Industries (COFI). He was also President of the BC Lumber Trade Council, Secretary of the Canadian Lumber Trade Alliance and Chair of the Board of the BC Bio Energy Network.

After leaving the private sector in 2013, John undertook a major review of BCTS and served as the Chief Negotiator, softwood lumber for the Province, as well as acted as strategic policy advisor for the FLNRORD.

John has a Master of Economics from Queen's University. He enjoys spending his time at the gym and playing guitar.

John will address the developments around some of the major BC government initiatives and BC Coast industry issues, some of which are very dynamic and impact some mills.

## **SESSION 5. TIMBER & LOG TRENDS**

### **TOPIC: North America Timber Trends**



**Rocky Goodnow**  
**Vice President**  
**Forest Economic Advisors, USA**

Rocky Goodnow is Vice President of the North American Timber Service at Forest Economic Advisors LLC. In this role, Rocky is responsible for FEA's outlook on the North American timber markets. Rocky leads the development of FEA's timber econometric models, which are used in the analysis of future demand on wood fiber resources, regional timber supplies, and timber values. Rocky is the primary author of FEA's Timber Quarterly Forecasting Service publications and is a contributor to other FEA publications and studies. Prior to FEA, Rocky worked at RISI Inc. from 2002-2009. At RISI, he was a key contributor to the analysis and production of RISI's North American Timber Forecast. He also co-authored numerous studies on a wide range of timber-related topics including regional pulpwood studies and an assessment of North America's emerging biomass industry. Rocky holds a Master's degree in forest economics and management and a B.S. in forestry, both from Virginia Polytechnic Institute and State University.

Rocky will address some of the key timber developments in the U.S. West and South as well as log exports. A discussion on timber trends in Canada will be discussed, including the timber harvest growth prospects in Eastern Canada.

## Speaker Profiles:

### SESSION 1. GLOBAL/ EUROPE/ RUSSIA

#### TOPIC: Europe: Lumber Industry & Outlook



**Sampsa Auvinen**  
**President**  
**European Organization of Sawmills (EOS)**

Sampsa Auvinen has been working in the forest industry for 26 years. He is the President of the European Organization of Sawmill Industries and a Board Member of the European Confederation of the Woodworking Industries.

Sampsa is a Board Professional serving on the Board of numerous companies in Finland, Estonia, Latvia, Germany and the USA. In the sawmilling industry Sampsa is a Board member of Westas Group Oy, Baltika Holzindustrie GmbH and Chairman of the Board of Pölkky Group Oy. Prior to becoming a Board Professional, Sampsa was Group CEO of Norvik Timber (mills in Latvia, Estonia, Sweden and Russia and other timber distribution and logistics company in the UK) for nine years.

Sampsa will address the many emerging trends in the European sawmill industry and status of lumber exports. Europe's growing position in China and the U.S. will be a key topic for delegates.

### SESSION 2. ASIA

#### TOPIC: JAPAN: Lumber & Log Market Outlook



**Jason Nomura**  
**President, Canfor Asia Corporation**

Jason Nomura has over 25 years of experience in sales and marketing of BC and European lumber products into Japan and other Asian countries. Throughout his career, he has held responsibilities in business management and market development.

In 2018, Jason was appointed President of Canfor Asia Corporation, overseeing Canfor's Asia markets which includes China, Korea and Japan.

Jason will address some of the following topics:

- Overall Japan market update
- Outlook on housing demand
- Areas of opportunities
- Overall Outlook

## **SESSION 5. TIMBER & LOG TRENDS**

### **TOPIC: NA: Housing & Lumber Demand Trends**



**Brendan Lowney**  
**Principal**  
**Forest Economic Advisors, USA**

Brendan Lowney is a Principal of Forest Economic Advisors LLC and develops and implements FEA's business strategies. As FEA's Macroeconomist, Brendan interprets and forecasts the North American and international economic landscape - analysis that forms the basis of FEA's industry projections. Brendan is also responsible for deepening FEA's coverage of the key end-use markets in the residual, manufacturing, and trade sectors. Brendan writes FEA's Macroeconomic Advisor and he is a contributing author to each of FEA's Quarterly Forecasting Service publications. Brendan earned a master's degree in economics from Boston College and holds a B.S. in mathematics and economics from Union College in Schenectady, NY.

Brendan will address some of the key economic drivers for North America and the all-important housing market. As well, analysis on the other consumption segments as well as drivers in key importing markets will be assessed.

## **SESSION 2. ASIA**

### **TOPIC: China: Log & Lumber Market Dynamics**



**Liu Nengwen**  
**President**  
**CTWPDA Association, China**

Mr. Liu Nengwen is the President of China Timber and Wood Products Distribution Association (CTWPDA) and a Director of the China Wood Value Promotion and Development Center.

Mr. Liu has worked for various Chinese government Ministries and was the Associate Director, Timber Conservation Center, Ministry of Internal Trade (1997 and 2000). He is currently the Director of the Timber Conservation Center, Ministry of Internal Trade (since 2000) and has served as the President of the CTWPDA since 2011.

Nengwen has made significant contributions to China's wood related technologies and has published over 70 reports on provincial and ministerial publications. He has also established the formulation of national and industrial timber and wood products standards.

Mr. Liu has an undergraduate degree on wood machinery and processing and a postgraduate degree in industrial economics.



**Shen Wei**  
**General-Secretary**  
**CTWPDA Association, China**

Shen Wei has a master's degree in Silviculture (2008) from the Chinese Academy of Forestry and began to work in the TRAFFIC China Office (an NGO involved in the wildlife trade monitoring) for three years. In those years, she worked in the areas of responsible timber trade and sustainable management of medicinal plants. Since then, she has worked at CTWPDA and is currently the Business Department Director, responsible for the management of subcommittees of Wood Importers, Wood Flooring, Wood-based Panel, and Home Furnishing Customization.

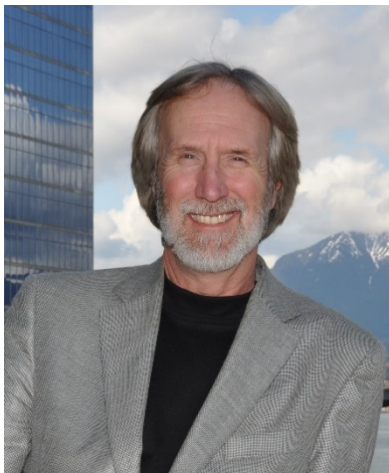
The CTWPDA is FEA's conference partner in China.

**Both speakers** will address the current China market and the outlook for the log and lumber trade.

## **SESSION 7. MASS TIMBER & INDUSTRIALIZED CONSTRUCTION**

### **DEEP DIVE: BC Interior, BC Coast & US PNW**

#### **TOPIC: BC Interior and MPB update**



**Jim Girvan**  
**Principal**  
**MDT Management, Canada**

Jim is recognized as an authority in timber supply, economic and statistical analysis and forecasting as it relates to the forest sector. Jim's 40-year career includes work in forestry consulting, pulp and paper fibre management, commercial banking and as an industry advocate with the Truck Loggers Association. With a degree in forestry and an MBA, Jim combines his extensive field experience with financial and analytical training to provide support in the areas of timber supply, fibre flow modeling and analysis, industry forecasting, statistical analysis and forest

policy.

Jim created the BC Fibre Model and this has been used extensively by B.C. forest products companies to determine the outlook for timber supplies and lumber production following the mountain pine beetle epidemic. This was also an integral part of two B.C. mountain pine beetle multi-client reports that were published by WOOD MARKETS.

Jim will provide an update on the B.C. Interior timber supply and the outlook for fibre supplies to sawmills, plywood mills, pulp mills and pellet mills.

## **SESSION 4. OCEANIA**

### **TOPIC: New Zealand: Industry & Export Outlook**



**Mark Smith**  
**Partner & General Manager**  
**FEA New Zealand**

Mark Smith heads up FEA's business in New Zealand. Mark has worked for major corporates in New Zealand in the forest and forest product sectors (Fletcher Paper and Carter Holt Harvey) in roles across strategic planning, operations management, R&D, new product development as well as running start-up businesses looking to commercialize new product and process technologies in the timber industry.

He was involved in significant work looking at applying wood modification technologies developed in Europe and how these could be applied to NZ wood species. This work has primarily been in New Zealand but has involved activity in Australia. Recently Mark has been involved more in looking at how wood, especially mass timber, can be utilized more in the New Zealand construction.

Mark is responsible for FEA business opportunities in New Zealand and Australia. He has a PhD in chemical engineering from the University of Auckland in New Zealand.

Mark will address the trends in the New Zealand timber harvest and log exports and how this could impact markets in China, Asia and India. He will also address new developments in government policy that could impact the log processing sector.

## **SESSION 1. GLOBAL/ EUROPE/ RUSSIA**

### **TOPIC: Russia: Log & Lumber Outlook**



**Martin Hermansson**  
**CEO**  
**RFI Consortium Ltd, Russia**

Martin Hermansson was born in Sweden and is now based in Russia. Martin has been in the industry since 2005. He is a co-owner and CEO of Novoeniseisk Woodworking Complex (Novo), with two sawmills in the Krasnoyarsk region of Siberia.

Mr. Hermansson has held top executive positions in companies active in the Russian timber harvesting, sawmilling and wood processing industries. After serving as CEO of Nord Timber Group in the Arkhangelsk region, Mr. Hermansson became CEO of RusForest Holdings in Krasnoyarsk and Irkutsk after the merger of Nord Timber Group with RusForest in 2010. He founded RFI Consortium in 2012 and currently serves as its CEO.

Martin will discuss some of the developments in the industry, including Russia's global competitiveness in the forest sector. He will discuss the opportunity for new Russian pulp mills as well as some of the legal changes in Russian forestry over the last 5 years.

## **SESSION 6. NORTH AMERICA LUMBER TRENDS**

### **TOPIC: Canada: Lumber Situation/Outlook**



**Christian Provost**  
**VP, Sales & Marketing**  
**Boscus Canada**

Christian Provost is currently the Vice President, Sales & Marketing of Boscus Canada and has held this position since 2008. Prior to that, he was the Business Development Director from 2004-2008. In his earlier years at Boscus he created a coordination department and developed and implemented a new computer system.

Christian is also the Vice President of the Board of Directors at Canada Wood and is also a member of the executive committee of QWEB. In 2004, he obtained his Master of Administration from the University of Quebec in Montreal.

Christian will discuss his views on the Canadian lumber industry, including some of the issues and the impact of import taxes on Canadian exports to the U.S. and offshore export markets.



## **SESSION 4. OCEANIA**

### **TOPIC: Australia: Industry & Export Outlook**



**Peter Zed**  
**CEO**  
**Omega Consulting, Australia**

Peter has over 45 years of experience in the Australian and international forestry sector. Prior to establishing Omega Consulting in 2008, he had been CEO of Allied Timber Products, Group Operations GM for Weyerhaeuser Australia, National Resources GM for CSR Timber Products (then Australia's largest timber products company) and has held several state GM roles with both CSR and Softwood Holdings.

Peter provides consulting services to both the forest investment and operational sectors of the forest products industry and maintains an extensive statistical profile of the timber industry within Australia. Peter has an honours degree in Forestry from the Australian National University and has extensive operational experience in both the manufacturing and forest management sectors.

Peter will address some of the following topics:

- Current softwood supply and demand dynamics in Australia
- Future plantation investment in Australia
- The expanding role of imported lumber in the Australian market
- Growth and potential outlook for log exports
- Potential use of hardwood plantations in the Australian timber products market

## **SESSION 6. NORTH AMERICA LUMBER TRENDS**

### **TOPIC: US: Lumber Situation/Outlook**



**Paul Jannke**  
**Principal**  
**Forest Economic Advisors, USA**

Paul Jannke is a Principal of Forest Economic Advisors LLC. FEA is a strategic source of North American wood products analysis and information.

Paul's main area of expertise is North American lumber markets and he has 20 years of experience in analyzing lumber markets and providing reliable, insightful forecasts. Paul is the author of FEA's Lumber Advisor and Lumber Quarterly Forecasting Service publications and other strategic reports. Paul has presented at many North American and international conferences on the markets for lumber, engineered wood products and structural panels.

Paul will discuss some of the key trends impacting the U.S. lumber demand and industry, including an assessment of offshore imports and his price outlook.

**SESSION 3. NO. AFRICA/SOUTH AMERICA**  
**TOPIC: Chile: Log & Lumber Market Outlook**



**Juan Pablo Pereira Sutil**  
**Commercial VP**  
**CMPC, Chile**

Juan Pablo Pereira is the Sales & Marketing VP of CMPC's Wood Products Division, based out of CMPC's headquarters in Santiago, Chile. His background is in the plywood, lumber, and millwork industry with experience and knowledge of more than 40 countries.

CMPC is one of the leading pulp & paper companies in the world with operations in eight countries. The primary focus is producing and selling forestry, pulp, paper, and tissue products. CMPC is one of the largest landowners in Latin America, with over 2,5 million acres of land in Chile, Argentina, and Brazil.

Juan Pablo will address the following topics:

- Plantations, log harvest, consumption, and production in Chile
- Plywood and lumber exports from Chile
- Primary markets for Chilean exports
- Global trade of plywood, trends, and key drivers
- Key industry trends & outlook

**SESSION 5. TIMBER & LOG TRENDS**  
**TOPIC: Global Timber & Timberland Trends**



**Clark Binkley**  
**Managing Director**  
**International Forestry Investment Advisors, LLC, USA**

Clark S. Binkley, Ph.D. is an internationally recognized expert in forestry investment with experience on all continents except Antarctica. He served as the Chief Investment Officer both for Greenwood Resources, and for the Hancock Timber Resource Group. Before joining the timberland investment business, he had a distinguished academic career as the Dean of the Faculty of Forestry at the University of British Columbia and at Yale University where he was the Frederick K. Weyerhaeuser Professor of Forest Resource Management. He has served the Boards of Directors of West Fraser Timber, TimberWest, Pacific Forest Products and Cellfor.

Clark holds degrees in Applied Mathematics and in Engineering from Harvard University and in Forestry and Environmental Studies from Yale University.

## **SESSION 5. TIMBER & LOG TRENDS**

### **TOPIC: North America Timber Trends**



**Rocky Goodnow**  
**Vice President**  
**Forest Economic Advisors, USA**

Rocky Goodnow is Vice President of the North American Timber Service at Forest Economic Advisors LLC. In this role, Rocky is responsible for FEA's outlook on the North American timber markets. Rocky leads the development of FEA's timber econometric models, which are used in the analysis of future demand on wood fiber resources, regional timber supplies, and timber values. Rocky is the primary author of FEA's Timber Quarterly Forecasting Service publications and is a contributor to other FEA publications and studies.

Prior to FEA, Rocky worked at RISI Inc. from 2002-2009 where he was a key contributor to the analysis and production of the North American Timber Forecast and he also co-authored numerous studies on a wide range of timber-related topics.

Rocky holds a Master's degree in forest economics and management and a B.S. in forestry, both from Virginia Polytechnic Institute and State University.

Rocky will address some of the key timber developments in the U.S. West and South as well as log exports. A discussion on timber trends in Canada will be discussed, including the timber harvest growth prospects in Eastern Canada and the decline in Western Canada.

## SESSION 2. ASIA

### TOPIC: India: Supply Gap Analysis



**Chris Gaston**  
**Associate Professor**  
**UBC, Canada**

Chris Gaston is an Associate Professor at the Faculty of Forestry at the University of British Columbia and past manager of the Markets & Economics Group at FP-Innovations in Vancouver, BC. He has degrees in Forestry Economics (Ph.D.) and Agricultural Economics & Business (B.Sc., M.Sc.) from the University of British Columbia and the University of Guelph, Ontario, Canada.

Chris has worked in both academics (teaching and research) and industry (management, consulting, research) and has over 35 years' experience in agribusiness and forestry. His research and consulting have focused on price-risk management strategies, market research, econometrics, and trade modeling. Recent research efforts have included value chain optimization and product development for Canada, the United States, Japan, China, and Europe. He is also past Chairperson and active member of the "Team of Specialists for Forest Products Marketing" for the UN Economic Commission for Europe. He has published widely and has spoken at conferences throughout the world.

Indroneil and Chris will both provide an update to the import sources of logs and lumber to India that they have been conducting since 2012. Their presentation will clearly show some of the supply gaps that are developing that should improve softwood imports to India from major exporting countries.

## SESSION 3. NO. AFRICA/SOUTH AMERICA

### TOPIC: Egypt & North Africa: Import Trends



**Ibrahim Elshal**  
**CEO & Purchase Director**  
**Elshal Timber, Egypt**

Ibrahim has been the CEO and Purchasing Director of his family's company "Elshal Timber" since 2007. Elshal Timber is a family company based in Mansoura and Alexandria, Egypt and works in softwood business for about 40 years. He is involved in softwood lumber imports and travels widely in softwood producing countries. Mr. Elshal obtained his bachelor degree of Architecture in 2006 from Mansoura university, and he has 17 years of experience in Egypt Softwood market.

Ibrahim will discuss the evolving market dynamics in Egypt and North Africa in general, and will provide his views on import trends for 2019 and beyond.

## **SESSION 7. DEEP DIVE: BC Coast & Interior Outlooks**

### **TOPIC: BC Timber Operator/Trader Perspective**



**David Martin**  
**Vice President of Operations**  
**A&A Trading Ltd., Canada**

Dave is a Registered Professional Forester and, as A&A Trading's Vice President of Operations, oversees all planning, engineering and development activities associated with properly managing a forest tenure and delivering logs to the highest end use markets.

Dave began his career and worked several years with a major coastal licensee before joining A&A in 2002 to open and manage an office in Terrace B.C to operate a market logging program. Dave is tireless advocate of the importance of relationship building, communication and understanding in order to foster and maintain mutually profitable businesses.

Dave is a graduate of the HBScF Co-op program at Lakehead University in Thunder Bay, Ontario. Dave has a long history of dedication to his community and industry having served on several boards such as the Northwest Loggers Association, Truck Loggers Association, Terrace Chamber of Commerce and the Terrace Economic Development Authority.

Dave will provide his perspective from operator's perspective in B.C., including that of a forest tenure holder, a logging operator and a log exporter. His topic will include some views on the challenges of working in a B.C. environment that includes ongoing change.

## **SESSION 2. ASIA**

### **TOPIC: India: Supply Gap Analysis**



**Indroneil Ganguly**  
**Assistant Professor**  
**Univ. of Washington, USA**

Dr. Indroneil Ganguly is an Assistant Professor at the University of Washington's School of Environmental and Forest Sciences and Associate Director of the Center for International Trade in Forest Products (CINTRAFOR). In 2008, Dr. Ganguly received a Ph.D. degree in 'forestry and international trade' from the University of Washington in Seattle.

On the international trade aspect, Dr. Ganguly's research investigates the impacts of trade/legality regulations on global wood-products trade flows. Over the past 15 years, Dr. Ganguly has undertaken research in India, China, Vietnam, Japan and, Thailand, exploring the market potential of North American wood species/products in these markets. Dr. Ganguly also teaches environmental economics, forestry and applied-biostatistics courses at the University of Washington.

**SESSION 1. GLOBAL/ EUROPE/ RUSSIA**  
**TOPIC: Global Overview & Competitive Dynamics**



**Russell Taylor, RPF, MBA**  
**Managing Director, FEA-Canada,**  
**(formerly President, WOOD MARKETS, Canada)**

Russ Taylor has led the WOOD MARKETS and now FEA-Canada team since 1992. Mr. Taylor conducts wood products marketing analysis and business assessment/competitiveness projects for numerous global industry clients and across North America. Mr. Taylor travels extensively and conducts research and analysis in many dynamic global regions, including Russia, China, Asia, and throughout the Southern Hemisphere and Europe. Mr. Taylor is known for his strategic insights and outlooks for global markets.

Mr. Taylor has published hundreds of articles and strategic reports and has conducted over 200 presentations at conferences and client meetings. He leads WOOD MARKETS/FEA in its eight strategic market intelligence and forecast reports on the global wood products industry and markets.

Russ has a forestry degree (BScF) and an MBA, both from the University of B.C., and is also a B.C. registered professional forester (RPF-Ret).

Russ will address some of the global market dynamics that he covers. As well, perspectives on the changing competitiveness in lumber manufacturing costs, the impact of U.S. import duties and other variables, and a delivered cost overview to key markets to profile the lowest cost exporters will be provided.

#### **NORTH AMERICA PANEL SESSION:**

- Tim Atkinson, VP Sales, Stimson Lumber, USA
- Tom Christensen, President/CEO, Christensen Lumber, USA
- Plus, speakers from the North America session

#### **INTERNATIONAL PANEL SESSION:**

- Chris McIver, VP, Sales & Marketing, West Fraser Timber, Canada
- Severin Rumplmayr, Overseas Sales Director, Donausaenge Rumplmayr, Austria
- Jane Guo, China Manager, FEA China, China
- Plus, speakers from the International sessions

#### **EXECUTIVE PERSPECTIVES SESSION:**

- Kai Merivouri, MD, Finnish Sawmills Association, Finland
- Slava Bychkov, MD, Marketing & Communication, Ilim Timber, Russia
- Andre Beaulieu, Director, Retail Sales, JD Irving, Canada
- Plus, some other invited delegates

**Contact us for further information. Additional conference details are available at:**  
<https://www.woodmarkets.com/conference/conferences-vancouver/2019-global-softwood-conference/> .