



Monday Market Report: 4/19/2021

Here we go again: lumber - up, plywood - up, freight - WHERE ARE THE FREAKIN TRUCKS!?! and oh yeah - up. Thank you all for tuning in and for the feedback that has been shared in the first week of our Market Report.

Freight has been cited by several producers and distributors this week as a significant factor on pricing and inventory availability. We have certainly seen it ourselves with several booked loads being inexplicably dropped and rescheduled. That paired with massive spikes in SPF pricing in nearby markets has brought more buyers into the Southern Yellow Pine market. All grades and widths of SYP lumber are up this week, and it does not look like much downward movement the rest of this month at least based on mill order files.

Plywood saw major increases again this week with a \$2-3/sheet increase week over week in most thicknesses. Strong economic indicators increased trading activity despite historic pricing, and OSB shortages continue to add pressure to an already taxed plywood supply. Housing starts hit a "seasonally adjusted" 15-year high in March, and distributors are scrambling to cover inventory needs for next month and beyond.

Please feel free to reach out to me with any specific questions or feedback on the Report or anything else in the wild world of lumber. The entire Lodge Lumber team is dedicated to being a valued partner to our customers, vendors, and to our community. We look forward to talking with you all soon!

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