

Trumbull Creek Times

"Winter Edition"

F.H. STOLTZE LAND & LUMBER CO.

This Issue

NEWS FROM THE PLANT

-PAGE 3-

SALES OFFICE

-PAGE 5-

LOGGING AND

FORESTRY

-PAGE 4-

HR

-PAGE 6-

EDITOR'S MESSAGE

-PAGE 7-

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Manager's Message

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So why do people pay \$150+ for a real Christmas tree? Nostalgia, tradition, sustainability, superior form and function? The answer is obviously "yes" to at least a few of those attributes.

I challenge you as a forest products user and most likely a forest user, or at least a forest admirer, to think differently about the value of forest management. What if our customers included not only the beauty and strength of our wood products in their purchasing decision, but also all the other ancillary benefits that come from high-quality stewardship of our forestlands? Would they choose differently? Would they tolerate a little higher cost knowing they receive the "triple bottom line" returns of sustainable wood products?

Back in the early 1990s, when Forest Certification first hit the streets, this was the promise. That if we just put this little stamp on our 2X4's, we would see folks flocking with open wallets to pay more for good forest management. It never played out that way.

How many of you go to the farmers' market for your food or buy local for your family's Christmas presents? Now, how many of you have asked for "Local Wood" when you build your house or chicken coop? What we have learned is that this "value" cannot be produced by the manufacturer but rather generated by the customer.

You've heard me say more than once that Stoltze needs to "get the value Montana wood deserves" to be able to continue doing what we do. We make healthy families, healthy forests, and healthy communities. But we pay for it with the value generated by our wood products.

So, think differently about the next 2X4 you purchase. Is it just a cheap building material or something more? Something that supports what you care about? Ask your local lumber yard for "Montana Wood"; we will all benefit.

And lastly, USE A REAL TREE this Christmas! Here in the West, we are fortunate to be able to buy a Christmas tree permit from the U.S. or State Forest Service for \$5 and get a good triple bottom line return on your investment; some exercise, some family time, and a little adventure will make that tree really light up your home.

From my family to yours, have a very Merry Christmas and a blessed New Year! Stay safe, be productive, and care for each other! And the good news is... the trees are still growing!

Best Wishes,
Paul McKenzie
Vice President – General Manager





News From the Plant

As Thanksgiving 2025 comes to an end and 2026 gets closer, it hits on how quickly time passes. It seems like yesterday we were gearing up for the summer season and trying to figure out how to take advantage of the warmer weather. Crazy how fast time flies by, maybe it just goes by faster the older you get?

When 2025 started, we were hoping that markets would pick up, so that we could make some much-needed improvements in our facility. Unfortunately, markets didn't improve. In fact, during parts of the year, it got a little worse. This, by far, is the longest downturn we have seen, maybe ever. One thing is for certain, we are still here and still producing good quality lumber. This is a testament to not only the Stoltze family but also to all of you out on the front line. We are here because of the dedication and determination of our employees, showing up every day to make the quality lumber we sell. It takes a team, from the employee pushing the broom, to the employee putting cants through the machines, to the employees checking our graded lumber, to the employees loading the trucks, to the maintenance departments making sure machines run at their max efficiency, and our front line supervisors making sure safety is followed, the best quality of lumber is produced, and production is at its most efficient flow. All of this is what it's going to take to survive and thrive and get the best value out of our Montana lumber. Thank you all for what you bring to this company and to this team. Keep doing what you're doing, and we will come out of this stronger than ever. It's going to take a complete team effort to make it through this market. There is no other team that I would rather be on, STOLTZE STRONG!

As 2026 fast approaches, we are working on figuring out what the markets will do. The bottom line is, it's anyone's guess. If anyone has a crystal ball that could help us out, it would be appreciated. But being optimistic, the first quarter will be much of the same. After that, things will start to pick up. And we will be ready to take full advantage of what customers are buying. In 2026, we will be working on making some specialty products out of low-grade lumber. We are hoping to get into some of these markets and take full advantage of getting the most value out of our lumber. There are no capital projects currently scheduled, but we are looking into upgrading a computer/control system in our sawmill and doing a couple of smaller projects in the planer to help with the flow. When markets do improve, we will be looking at doing other projects and making some much-needed purchases in other departments.

One thing I know will happen in 2026 is that F.H. Stoltze Land & Lumber Co. will not be going anywhere! We will be right where we are today, making a great quality product, safely, and efficiently. We will be here because of the great employees we have working and because of the tremendous support we have from the Stoltze Family.

I look outside and see snow falling, I can't help but feel grateful for my family and friends, grateful for my work family and friends, and grateful for this company. Thank you all, past, present, and future employees, and the Stoltze Family, for your relentless dedication and commitment to F.H. Stoltze Land & Lumber Co. It's because of you all that we have seen 110 plus years and will see 110 more!

Keep moving forward, keep plugging away, and take every day as it comes. Remember, tomorrow is not promised. Keep the attitude positive- you and only you can control your outlook on what lies ahead. Work safe, play safe, hug your loved ones a little tighter, and smile a little longer. Let's finish 2025 strong and make 2026 our comeback year!

Trevor Kjensrud
Plant Manager





Forester Ramblings

Since our May newsletter the logs have been rolling in! With no fire season and great summer weather (rain once a week), with no real adverse events to speak of, log deliveries remained relatively stable. Starting in August, we actually had to slow deliveries because logs were coming in un-rentlessly! But my, how the tides have changed... For the last three months, we remained relatively flat-lined for log yard inventory, which was by design... kind of. Our master plan of pumping the brakes in the hot months with a gradual climb and inventory increase starting in October did not come to fruition as planned! Now, we have been getting Mother Nature's backhand of wet and cold weather. Cold enough to not freeze but also not warm enough to dry out, and wet enough to slow deliveries and even logging in some cases to a complete halt. Thus are the trials and tribulations of foresters and log purchasers! Weather is one of the factors that keeps this job interesting and challenging, throwing curveballs that are always unpredictable.

Switching gears to fiber supply. Stoltze acquires about 70% of its fiber from public lands: Forest Service and MT DNRC Lands. So naturally, we are active in advocating for the management of our public lands. Managing for timber supply for our mill, but also all the other good benefits of active management that people tend to forget go along with logging: reduced fuels and wildfire potential, enhancing wildlife habitat, maintaining clean water for communities and aquatic ecosystems, and yes, keeping a forest healthy - insect and disease free!

On the national scene of public land management, there are a lot of positive policy decisions being made that we are hoping will translate into increased management of our national forests and, of course, increased log supply. There has been executive orders from the president, an emergency site determination letter from Secretary Rollins - expediting management in high fire danger areas (most of the west), a direct letter from the Deputy Chief of the Forest Service detailing how the national forests will implement executive orders, issuance of the National Active Forest Management Strategy, proposed rescission of the roadless rule to help manage areas that have traditionally been off limits but vector fire into our communities, and lastly endangered species reform which should allow managers more flexibility when working around threatened and endangered species and their habitats - which we are surrounded by!

However, probably the biggest news in our neighborhood from the national front is the MT DNRC and Forest Service entering into a Shared Stewardship Agreement. This agreement will be around 200,000 acres of USFS land that the MT DNRC will manage through GNA (Good Neighbor Authority). This is a direct agreement to try and expedite management of our local national forests to support local infrastructure. Forest Service Chief Schultz understands that without infrastructure, our forests turn from assets into giant liabilities - landscapes of wildfire and cost. Sawmills provide avenues to make management of our forests affordable, profitable, and a sustained stream of revenue to our local communities, and of course, ensure all the benefits continue that come along with active forest management, as I previously mentioned. Thank you to Chief Schultz and Governor Gianforte for bringing a first of its kind landscape level agreement to Montana. We look forward to helping you make this successful!

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"FILL THE TILL!"

News from the

Sales Office



With 2025 winding down, I like to look back at the year and remember what I'm thankful for. There is more than I can list, but I am sure happy to live in Montana and work for a 100+ year old family-owned company. I'm thankful for the people I work with and the camaraderie I have with my coworkers. I'm thankful that the snow has started to fall and we'll be able to ski soon! Lots to be thankful for here in Montana.

Lumber sales have been up and down this year with some big swings in demand. Prices have been slightly better than last year and seem like they will continue the trend upward after the first of the year. The outlook for next year feels promising. All indications seem to say the first quarter could see some decent price levels. There are a lot of factors that could change that, but we hope the positive sentiment we're hearing carries through. If interest rates continue to drop and inflation subsides, we could see some increased volume in the housing industry, but we aren't out of the woods yet. The national long-term forecast is a bit cloudy, but Montana markets have been more robust. Some of our best customers are within 200 miles of us, and the local need for lumber has outpaced the national demand. The exodus from the urban areas into more rural living has been strong, and it will continue. This supports a local building market that is somewhat disconnected from national trends.

I recently attended the North American Wholesale Lumber Association tradeshow, NAWLA, in Kansas City, Missouri. It was a little smaller than last year, but I made multiple new contacts and met with some of our existing customers. There was a lot of interest from people looking for Lamstock. This is something we've experimented with before, and we will continue to work on this with the hope of completing the R and D around the first of the year. The Lamstock needs we are seeing will compete with some of the other manufacturing lines currently in place that use high-quality wood. We have some of the highest quality slow-growing fiber on the continent. The density of trees lends itself well to MSR production, and we have been able to capitalize on that for a long time. The dense fiber also works well in flooring and molding, which some secondary manufacturers have purchased our wood for. It will be interesting to see if these trends push the price higher for what we have here.

In March, we started an appointment system for loading lumber trucks. So far, it has worked out really well. We have kept some flexibility to load as many trucks as possible, and we have been able to adjust as needed to accommodate our customers. Our cycle times for getting trucks in and out have dropped drastically from when we used to do a first-come first-served type of schedule.

As I sit typing this, the snow is falling, and I'm getting anxious to get outside. We live in an amazing place, and we should all pause to take that in. Keep your family and friends close and don't forget what we have to be thankful for. I hope you all have a Merry Christmas and a happy New Year.

John Bolles
Sales Manager





It's been a busy year from the personnel desk! Hard to believe 2025 is already coming to a close. This year, a more stable hiring market has allowed us to welcome many new employees to the Stoltze family. This has strengthened our team and helped us continue producing high-quality, Montana-made and sourced wood products.

With the New Year just around the corner, it's the perfect time to pause, reflect, and plan ahead. For our employees, this includes reviewing your benefit selections during the upcoming open enrollment period to ensure your benefits continue to meet your needs and support you and your family in the year ahead.

Thank you for being a valued member of the Stoltze family. Wishing you a safe, happy, and prosperous New Year!

Leah Michael
Personnel Manager



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I want to end this on a positive note. Stoltze was awarded the Governor's Award for Forest Management Excellence this past October. Although I wasn't present when Governor Gianforte dropped by to present our award, I want to thank all our contractors and employees who exemplify this excellence in forestry and further Stoltze's 113-year reputation of forestry excellence. This award showcases our commitment to being a steward of Montana's forests and how our mill is creating high-value wood products, generating the value that Montana's forests deserve.

Happy Thanksgiving and Christmas to everyone. Thank you for your hard work in 2025. I look forward to working towards a successful 2026; it will take a team!

Cameron Wohlschlegel
Lands & Resource Manager





As we wrap up 2025 and look ahead to a new year, I find myself thinking about what it really means for a company to last as long as this one has- 113 years. Around here, longevity isn't something we take for granted. It's proof that Stoltze has been through just about every challenge this industry can throw at a business, and we've come out on the other side each time. That doesn't happen by chance.

Tough markets aren't new to us. Anyone who has been in the timber business for more than five minutes knows how quickly things can swing. Prices rise and fall. Weather cooperates until it doesn't. Regulations shift. Supply tightens. Demand slows. None of this is unfamiliar territory for Stoltze- we've seen versions of all of it before, and sometimes worse.

What has kept this place running for more than a century isn't luck or timing. It's how we respond when things get difficult. Our values have carried the company through market crashes, recessions, fires, and everything else thrown our way over the last 113 years.

Looking ahead to 2026, there's no crystal ball. Markets may stay soft for a while, or they may turn sooner than expected. What we do know is that Stoltze has weathered tougher times, and we'll do it again. We'll keep improving where we can, keep focusing on quality and efficiency, and keep relying on the strength of our people.

The next chapter of this company won't be defined by outside conditions. It will be defined by how we respond.

As a follow-up to the IT update in the last newsletter, we are nearing completion of the network expansion. The project proved to be more complex than originally anticipated, largely due to years of incremental additions implemented in many different ways. Despite those challenges, we have taken a significant step toward standardizing and streamlining our network. The camera rollout slowed during the network rebuild, but with this phase nearing completion, we expect installations to resume and proceed far more efficiently going forward.

Here's to ending 2025 strong and welcoming a prosperous 2026.

Merry Christmas and Happy New Year.

Josef Kuchera
Office Manager/Editor

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