



Global Sawnwood Market

Market size, segmentation, competitive landscape and outlook

2021-2031



Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

Disclaimer

This report was prepared by shev.io solely for information purposes. shev.io does not guarantee the accuracy and completeness of all information contained in the report, as the data in some sources may have been distorted inadvertently or deliberately. The information presented in this report must not be construed, directly or indirectly, as containing recommendations for further business action. All opinions and estimates contained in this report reflect the authors' judgement as at the date of publication and may be changed without notice.

shev.io accepts no liability for any loss or damage arising from any third party's use of the information contained in this report, including published opinions or conclusions, or for consequences caused by the incompleteness of the information presented. The information presented in this report is obtained from open sources. Additional information may be provided on request.

This document, or any part of it, may not be distributed without the written permission of shev.io, nor reproduced by any means.

Terms of use

This report is provided to the user under a **non-exclusive, non-transferable, limited licence** solely for internal use within the purposes for which the report was lawfully acquired.

The user **may not**, in whole or in part, transfer, sell, gift, publish or otherwise distribute the report to third parties, nor pass it to any other legal entities, partner organisations or external teams (including affiliated companies). It is prohibited to place the report (or fragments of it) in the public domain (websites, social networks, messengers, file-sharing services, open-link cloud storage) or to provide access through third-party services where this allows third parties to review the materials.

If the report is purchased by a **company**, its use is permitted **only by that company's employees** for internal tasks. Passing the report to contractors, consultants, freelancers, agencies and any external parties is prohibited.

All exclusive rights to the report — including its structure, texts, data selection, visualisations, tables, charts and design elements — belong to the rights holder (shev.io) or are used on lawful grounds. The user receives the right to use the report only within these terms.

Without shev.io's written consent it is prohibited to create derivative products based on the report, to use it as part of a commercially distributed product or service, or to remove or alter copyright notices.

The use of **short quotations** and fragments is permitted **only in internal documentation** (internal memos, reports, presentations, working correspondence), provided the meaning and context are preserved and the source is credited: *shev.io*. Any publication or use of the materials in places accessible to third parties is permitted only with shev.io's prior written consent.

Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2025)	USD 165.4 bn
Forecast (2031)	USD 204.7 bn
CAGR (2021-2031)	3.6%
Study period	2021-2031
Largest region	Asia-Pacific · 38%
Fastest-growing region	Asia-Pacific · 4.7%
Market concentration	Low
Licence	Individual / Company

The global sawnwood market was valued at USD XXX billion in 2025 and is forecast to reach USD XXX billion by 2031, expanding at a CAGR of XX%. Construction accounts for XX% of market value, while softwood represents XX% of sales because of its dominant role in structural framing, mass timber, packaging and general-purpose joinery. Asia-Pacific leads with a XX% share, supported by Chinese processing demand, Japanese timber construction, Indian urbanisation and Southeast Asian furniture manufacturing. Supply-chain traceability, constrained sawlog availability and investment in automated, high-recovery mills are reshaping competitive advantage.

Table of contents

1 Introduction and Report Scope

- 1.1 Market Definition
- 1.2 Product Coverage and Exclusions
- 1.3 Study Period, Currency and Units

2 Research Methodology

- 2.1 Secondary Research Programme
- 2.2 Primary Interview Programme
- 2.3 Market Sizing and Triangulation
- 2.4 Forecast Model and Scenarios

3 Executive Summary

- 3.1 Market Size and Forecast
- 3.2 Segment and Regional Highlights
- 3.3 Strategic Takeaways

4 Global Sawnwood Market Dynamics

- 4.1 Growth Drivers
- 4.2 Market Restraints
- 4.3 Technology and Processing Trends
- 4.4 Regulatory and Trade Environment
- 4.5 Porter's Five Forces Analysis

5 Global Sawnwood Market Size and Forecast

- 5.1 Market Value, 2021-2031
- 5.2 Market Volume, 2021-2031
- 5.3 Pricing and Revenue per Cubic Metre

6 Sawnwood Market by Wood Type

- 6.1 Softwood
- 6.2 Temperate Hardwood
- 6.3 Tropical Hardwood

7 Sawnwood Market by Product Condition

- 7.1 Green and Air-Dried
- 7.2 Kiln-Dried
- 7.3 Treated and Modified

8 Sawnwood Market by Application

- 8.1 Construction
- 8.2 Furniture
- 8.3 Pallets and Packaging

8.4 Joinery and Flooring

8.5 Other Industrial Uses

9 Sawnwood Market by Sales Channel

9.1 Direct Industrial Sales

9.2 Wholesalers and Distributors

9.3 Retail and Home Improvement

10 Sawnwood Market Regional and Country Analysis

10.1 North America

10.1.1 United States

10.1.2 Canada

10.1.3 Mexico

10.2 Europe

10.2.1 Germany

10.2.2 United Kingdom

10.2.3 Sweden

10.2.4 Finland

10.2.5 Austria

10.2.6 France

10.2.7 Rest of Europe

10.3 Asia-Pacific

10.3.1 China

10.3.2 India

10.3.3 Japan

10.3.4 Australia

10.3.5 Vietnam

10.3.6 Indonesia

10.3.7 Rest of Asia-Pacific

10.4 Latin America

10.4.1 Brazil

10.4.2 Chile

10.4.3 Rest of Latin America

10.5 Middle East and Africa

10.5.1 Türkiye

10.5.2 Saudi Arabia

10.5.3 South Africa

10.5.4 Rest of Middle East and Africa

11 Competitive Landscape

11.1 Market Share and Concentration

11.2 Strategic Benchmarking and Recent Developments

11.3 Company Profiles

11.3.1 West Fraser Timber Co. Ltd.

11.3.2 Weyerhaeuser Company

11.3.3 Canfor Corporation

11.3.4 Interfor Corporation

11.3.5 Stora Enso Oyj

11.3.6 SCA

11.3.7 UPM-Kymmene Corporation

11.3.8 Metsä Fibre Oy

11.3.9 Binderholz GmbH

11.3.10 Pfeifer Holding GmbH

11.3.11 HS Timber Group

11.3.12 Vida AB

12 Forecast Scenarios and Strategic Opportunities

12.1 Base, Upside and Downside Cases

12.2 Product and Country Opportunity Matrix

12.3 Strategic Recommendations

List of tables

Table 1. Sawnwood Market Snapshot and Headline Indicators
Table 2. Base, Upside and Downside Forecast Scenarios
Table 3. Top Growth Opportunities by Product and Region
Table 4. Global Sawnwood Market Value by Year, 2021-2031
Table 5. Global Sawnwood Market Volume by Year, 2021-2031
Table 6. Average Revenue per Cubic Metre by Wood Type, 2021-2031
Table 7. Forecast Sensitivity to Housing Starts, Sawlog Costs and Prices
Table 8. Market Driver Impact Matrix by Geography and Horizon
Table 9. Market Restraint Impact Matrix by Geography and Horizon
Table 10. Housing and Construction Indicators in Major Sawnwood Markets
Table 11. Mass-Timber Lamstock Demand Indicators
Table 12. Sawlog Availability and Delivered-Wood Cost Conditions by Supply Basin
Table 13. Market Value and Volume by Wood Type, 2021-2031
Table 14. Market Value and Volume by Product Condition, 2021-2031
Table 15. Market Value and Volume by Application, 2021-2031
Table 16. Market Value and Share by Sales Channel, 2021-2031
Table 17. Wood Type by Application Cross-Segmentation, 2025
Table 18. Product Condition by Region Cross-Segmentation, 2025
Table 19. North America Sawnwood Market by Country, 2021-2031
Table 20. Europe Sawnwood Market by Country, 2021-2031
Table 21. Asia-Pacific Sawnwood Market by Country, 2021-2031
Table 22. Latin America Sawnwood Market by Country, 2021-2031
Table 23. Middle East and Africa Sawnwood Market by Country, 2021-2031
Table 24. Regional Production, Consumption, Imports and Exports, 2025
Table 25. Major Bilateral Sawnwood Trade Corridors by Volume and Value
Table 26. HS 4407 Trade Classification and Product Coverage
Table 27. Tariffs and Trade Remedies Affecting Major Corridors
Table 28. EUDR, Lacey Act and Legality-Verification Requirements
Table 29. FSC, PEFC and Phytosanitary Requirements by Market
Table 30. Competitive Benchmarking of Leading Sawnwood Producers
Table 31. West Fraser Timber Company Profile
Table 32. Weyerhaeuser Company Profile
Table 33. Canfor Corporation Company Profile
Table 34. Interfor Corporation Company Profile
Table 35. Stora Enso Company Profile

Table 36. SCA Company Profile

Table 37. UPM-Kymmene Company Profile

Table 38. Metsä Fibre Company Profile

Table 39. Binderholz Company Profile

Table 40. Pfeifer Group Company Profile

Table 41. HS Timber Group Company Profile

Table 42. Vida Company Profile

Table 43. Opportunity Ranking by Country, Product and Application

Table 44. Strategic Actions for Producers, Traders and Industrial Buyers

Table 45. Forecast Risks, Triggers and Early-Warning Indicators

Table 46. Market value by year, USD bn

Table 47. Year-over-year value change

Table 48. Drivers — impact on forecast

Table 49. Restraints — impact on forecast

Table 50. Value by wood Type, USD bn

Table 51. Value by product Condition, USD bn

Table 52. Value by application, USD bn

Table 53. Value by sales Channel, USD bn

Table 54. Market value by region, USD bn

Table 55. Market value by leading country, USD bn

Table 56. Leading companies

List of figures

- Figure 1. Global Sawnwood Market Value, 2021-2031
- Figure 2. Global Sawnwood Production and Consumption Volume, 2021-2031
- Figure 3. Sawnwood Market Value and Year-on-Year Growth, 2021-2031
- Figure 4. Average Sawnwood Revenue per Cubic Metre, 2021-2031
- Figure 5. Driver and Restraint Impact on Sawnwood Market CAGR
- Figure 6. Construction, Furniture and Packaging Demand Indices, 2021-2031
- Figure 7. Sawnwood Market Share by Wood Type, 2025
- Figure 8. Sawnwood Market Share by Product Condition, 2025
- Figure 9. Sawnwood Market Share by Application, 2025
- Figure 10. Segment CAGR Comparison, 2025-2031
- Figure 11. Global Sawnwood Market Share by Region, 2025
- Figure 12. Sawnwood Market CAGR by Region, 2025-2031
- Figure 13. Net Export Position of Major Producing Countries, 2025
- Figure 14. Global Sawnwood Export Volume and Trade Intensity, 2021-2025
- Figure 15. Leading Sawnwood Exporting Countries by Volume, 2025
- Figure 16. Global Sawnwood Company Market Share, 2025
- Figure 17. Leading Producers by Estimated Sawmilling Capacity
- Figure 18. Incremental Sawnwood Revenue by Region, 2025-2031
- Figure 19. Opportunity Attractiveness by Segment and Region
- Figure 20. Value share by wood Type, 2025
- Figure 21. Value share by application, 2025
- Figure 22. Growth rate by region, 2025-2031

Executive summary

The global sawnwood market was valued at USD XXX billion in 2025 and is forecast to reach USD XXX billion by 2031, expanding at a CAGR of XX%. Construction accounts for XX% of market value, while softwood represents XX% of sales because of its dominant role in structural framing, mass timber, packaging and general-purpose joinery. Asia-Pacific leads with a XX% share, supported by Chinese processing demand, Japanese timber construction, Indian urbanisation and Southeast Asian furniture manufacturing. Supply-chain traceability, constrained sawlog availability and investment in automated, high-recovery mills are reshaping competitive advantage.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global sawnwood production reached XXX cubic metres in 2024, unchanged from 2023 and XX% below 2020, according to the Food and Agriculture Organization of the United Nations.
- Global sawnwood exports totalled XXX cubic metres in 2024, down XX% year on year and XX% below 2020, according to FAO.
- The market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Softwood represented XX% of 2025 market value, reflecting its scale advantage in structural framing, pallets and mass-timber laminations.
- Construction absorbed XX% of sawnwood value in 2025 and will expand at a XX% CAGR through 2031.
- Asia-Pacific held XX% of global revenue and will record the fastest regional CAGR at XX%.
- Kiln-dried sawnwood accounted for XX% of value as dimensional stability and moisture specifications became more important in construction and furniture supply chains.
- The UNECE region consumed XXX cubic metres of sawn softwood in 2023, XX% less than in 2022.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Sawnwood Market Trends and Growth Drivers

Sawnwood demand sits at the intersection of housing, manufacturing and global forest-resource economics. The market's cyclical core remains residential construction, but furniture, packaging, renovation and mass timber diversify the demand base and increasingly reward tighter moisture, grade and provenance specifications.

Supply is becoming structurally less elastic in several mature producing regions. British Columbia's reduced harvest, Nordic and Central European sawlog competition, wildfire risk and environmental restrictions raise the value of owned forests and long-term fibre contracts. Plantation-based producers in the US South and Southern Hemisphere gain relative importance as a result.

Value creation is shifting from simple throughput toward recovery, consistency and data. Optical scanning, CT optimisation, continuous drying and digital chain-of-custody systems allow mills to recover more saleable product, direct boards to higher-value uses and satisfy traceability-led procurement.

Growth drivers

Asia-Pacific housing and urbanisation

Household formation, urban migration and infrastructure investment are expanding demand for framing, formwork, joinery and furniture-grade lumber. India and Southeast Asia generate the strongest incremental volume, while Japan and Australia sustain higher-value demand for graded and certified material.

Low-carbon construction substitution

Embodied-carbon targets are increasing the specification of wood in place of emissions-intensive structural and interior materials. The effect is strongest where building codes, public procurement and life-cycle assessment frameworks support timber construction.

Mass timber and off-site construction

CLT, glulam and hybrid systems create demand for kiln-dried, strength-graded lamstock with consistent dimensions and fibre properties. Prefabrication also shortens construction schedules and increases the value captured by mills capable of scanning, sorting and machining to specification.

Furniture and interior manufacturing

Furniture clusters in China, Vietnam, Poland, Türkiye, Mexico and India require stable supplies of appearance-grade hardwood and softwood. Export-oriented manufacturers increasingly favour kiln-dried and certified inputs that reduce reject rates and satisfy buyer sourcing policies.

Sawmill automation and recovery gains

3D log scanning, machine vision, AI cutting optimisation and continuous kilns raise saleable recovery and product consistency. These investments support margins by directing each board toward the highest-value grade and reducing energy, labour and fibre losses.

Pallet and transport-packaging demand

Manufacturing, food distribution and cross-border merchandise trade sustain demand for pallet stock, crates and dunnage. Repairable and pooled pallet systems provide recurring consumption of standardised industrial lumber even when residential construction weakens.

Restraints

Housing-cycle and interest-rate exposure

Residential construction is the market's largest demand centre and responds quickly to mortgage rates, developer finance and consumer confidence. Weak starts cause rapid inventory accumulation and price compression, particularly in commodity structural softwood.

Constrained sawlog availability

Wildfire losses, insect damage, conservation rules, reduced allowable cuts and competition from pulp and energy users tighten access to economic sawlogs. Mills without captive or contracted fibre face higher delivered-wood costs and greater curtailment risk.

Tariffs and trade-route disruption

Antidumping and countervailing duties alter the landed cost and trade flow of Canadian softwood lumber into the United States, while sanctions and logistics constraints redirect Eurasian supply. Freight-rate volatility compounds the effect for low-value commodity grades.

Traceability and certification expense

Geolocation, legality verification, segregation and chain-of-custody requirements increase data and working-capital demands across fragmented supply chains. Small mills and traders face the highest unit compliance cost, accelerating consolidation in export-facing channels.

Driver and Restraint Impact on the Sawnwood Market

Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Asia-Pacific housing and urbanisation	XXX	XXX	XXX
Low-carbon construction substitution	XXX	XXX	XXX
Mass timber and off-site construction	XXX	XXX	XXX
Furniture and interior manufacturing	XXX	XXX	XXX
Sawmill automation and recovery gains	XXX	XXX	XXX
Pallet and transport-packaging demand	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Housing-cycle and interest-rate exposure	XXX	XXX	XXX
Constrained sawlog availability	XXX	XXX	XXX
Tariffs and trade-route disruption	XXX	XXX	XXX
Traceability and certification expense	XXX	XXX	XXX

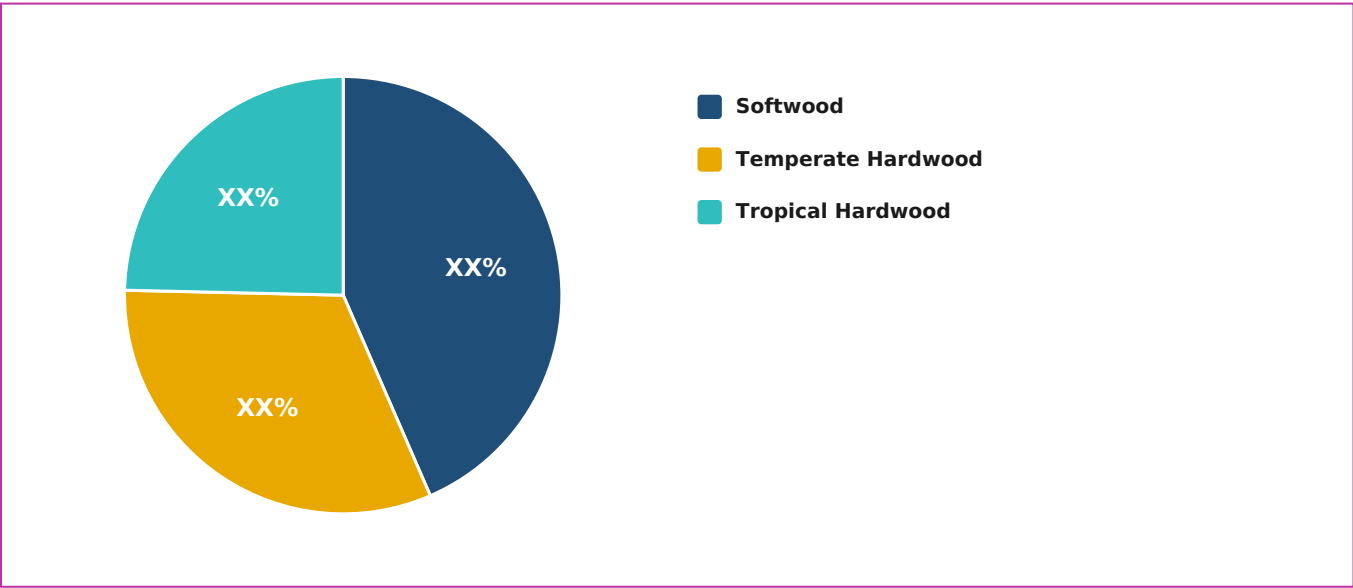
Source: XXX

Sawnwood Market Segmentation by Wood Type, Condition, Application and Channel

By Wood Type

Softwood dominates structural framing, packaging and engineered-wood feedstock because conifer plantations and boreal forests support scalable, standardised supply. Hardwood commands higher unit values in furniture, flooring and appearance applications. Temperate hardwood grows faster than tropical hardwood as legality requirements and buyer sourcing policies redirect procurement.

Value share by wood Type, 2025



Source: XXX

Value by wood Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Softwood	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Temperate Hardwood	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tropical Hardwood	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Product Condition

Kiln drying leads because structural, furniture and export buyers require controlled moisture, stability and phytosanitary performance. Green and air-dried lumber remains important in local construction, pallets and further processing. Treated and modified products grow fastest as durability, fire performance and exterior applications support premium pricing.

Value by product Condition, USD bn

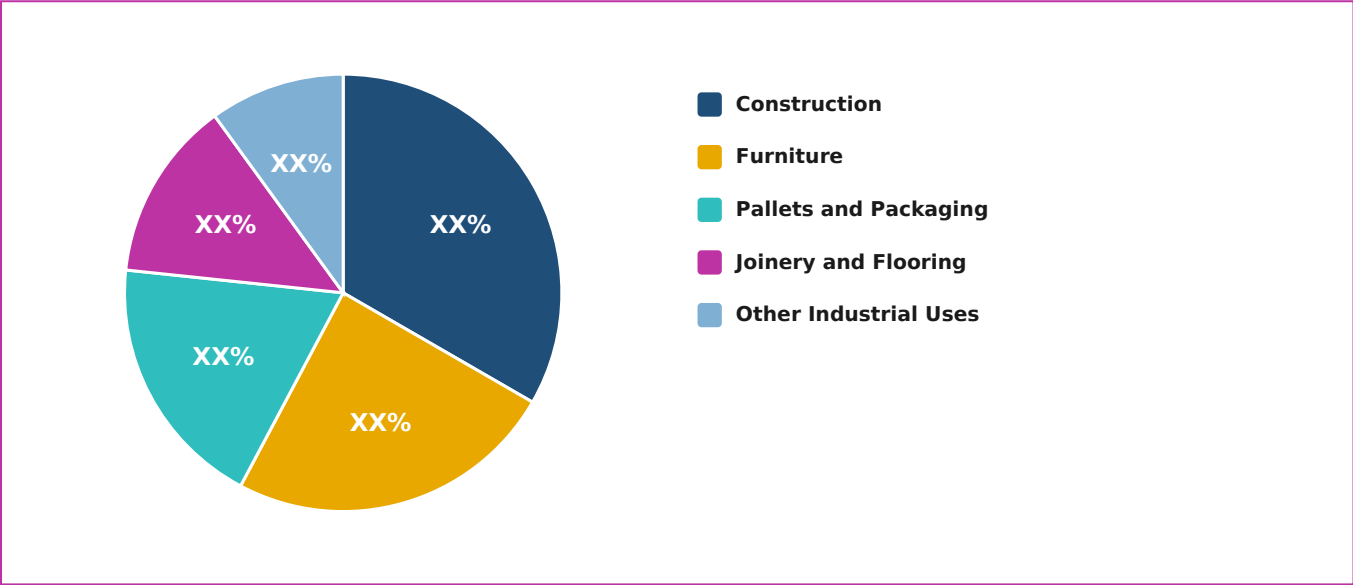
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Green and Air-Dried	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Kiln-Dried	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Treated and Modified	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Construction leads through light-frame housing, roofing, formwork, renovation and mass-timber supply. Furniture demand benefits from Asian manufacturing and replacement cycles, while packaging provides a comparatively defensive outlet for lower grades. Joinery and flooring deliver the highest value per cubic metre and favour dried appearance-grade lumber.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Construction	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Furniture	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pallets and Packaging	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Joinery and Flooring	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Industrial Uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Direct contracts dominate high-volume structural, furniture-component and packaging accounts, enabling grade-specific cutting and logistics planning. Wholesalers and distributors aggregate species, dimensions and origins for fragmented construction and joinery customers. Retail and home-improvement channels carry the highest unit margins but a narrower range of standard dimensions.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Industrial Sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wholesalers and Distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail and Home Improvement	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

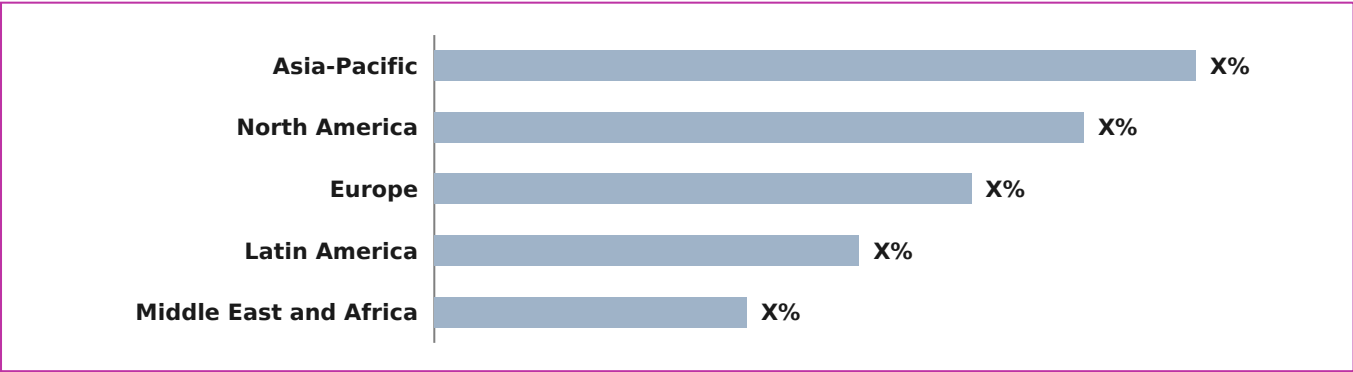
Sawnwood Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global market value in 2025 and will expand at a XX% CAGR through 2031. China remains the region's largest producer, processor and consumer, but the incremental-demand story is broadening toward India, Vietnam, Indonesia and the Philippines as urban construction, furniture exports and organised timber distribution expand. Japan, South Korea and Australia sustain premium demand for kiln-dried, graded and certified softwood.

North America held XX% of value, supported by the scale of US light-frame housing and the Canadian supply base. Mill closures and harvest constraints in British Columbia are shifting production toward the US South, while duties on Canadian lumber raise landed-cost volatility. Europe accounted for XX%, with the Nordics, Germany and Austria serving as production and export hubs; tight sawlog markets and EUDR implementation are increasing the value of integrated fibre ownership and digital traceability.

Latin America and the Middle East and Africa together represented XX% of revenue. Brazil and Chile combine plantation resources with competitive conversion economics, while Uruguay is emerging as an additional forest-products platform. Gulf construction, North African housing and Sub-Saharan urbanisation support import demand, although currency availability, logistics and informal distribution keep growth uneven.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Sawnwood Market Competitive Landscape and Company Share

The global sawnwood market has low concentration: the ten largest suppliers captured XX% of 2025 revenue. Leadership is regional because fibre baskets, freight economics, species availability, building codes and customer dimensions favour mills located close to forests and end markets. West Fraser, Weyerhaeuser, Canfor and Interfor have substantial North American exposure, while Stora Enso, SCA, UPM, Metsä Fibre, Binderholz and Pfeifer anchor European supply.

Competitive advantage is moving toward control of sawlogs, high-throughput automation and the ability to monetise the full log. Integrated groups use chips, bark and sawdust in pulp, panels, pellets and process energy, lowering net conversion cost. Stora Enso's acquisition of Junnikkala added XXX cubic metres of sawmilling capacity, while Vida's purchase of AB Karl Hedin Sågverk added approximately XXX board feet and demonstrates the continuing consolidation of Nordic fibre and capacity.

Near-term strategy remains disciplined because weak housing demand and high wood costs have forced curtailments and closures. Canfor closed its Estill and Darlington mills in South Carolina, and Interfor implemented broad North American production curtailments in 2025. Capital is concentrating on brownfield modernisation, continuous kilns, scanning, value-added finishing and timberland ownership rather than undifferentiated greenfield commodity capacity.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
West Fraser Timber Co. Ltd.	XXX	XXX	XXX	XXX
Weyerhaeuser Company	XXX	XXX	XXX	XXX
Canfor Corporation	XXX	XXX	XXX	XXX
Interfor Corporation	XXX	XXX	XXX	XXX
Stora Enso Oyj	XXX	XXX	XXX	XXX
SCA	XXX	XXX	XXX	XXX
UPM-Kymmene Corporation	XXX	XXX	XXX	XXX
Metsä Fibre Oy	XXX	XXX	XXX	XXX
Binderholz GmbH	XXX	XXX	XXX	XXX
Pfeifer Holding GmbH	XXX	XXX	XXX	XXX
HS Timber Group	XXX	XXX	XXX	XXX
Vida AB	XXX	XXX	XXX	XXX

Source: XXX

Global Sawnwood Market Forecast and Investment

Opportunities

Global market value will rise from USD XXX billion in 2025 to USD XXX billion in 2031, while physical demand grows more slowly. Kiln drying, treatment, strength grading, certification and machining increase the realised value per cubic metre, and Asia-Pacific contributes XX% of incremental global revenue over the forecast period.

The base case assumes gradual recovery in North American and European residential construction, continued Asian urban growth and stable global sawnwood availability. The upside case is driven by faster mortgage-rate normalisation and mass-timber adoption; the downside case centres on prolonged housing weakness, trade escalation and deeper harvest reductions in Canada and Europe.

Winning suppliers will combine dependable fibre access with flexible production and verified provenance. High-value opportunities cluster around mass-timber lamstock, appearance grades, thermally or chemically modified lumber, industrial components and digitally documented low-risk supply. Commodity mills lacking secure logs, energy integration or export flexibility will face the greatest consolidation pressure.

Opportunities

- EUDR-compliant verified supply from low-risk origins
- Kiln-dried, strength-graded and treated premium products
- Mass-timber lamstock and appearance-grade lumber
- Fast-growing Indian and Southeast Asian import markets
- AI-enabled log scanning and yield optimisation
- Monetisation of bark, chips, sawdust and renewable process heat

This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24-72 hours.