FRENCHTIMBER
MADE IN FRANCE

INTERNATIONAL HARDWOOD CONFERENCE
ANTWERP 2026



Temperate hardwood logs and lumber international trade flows

6th November 2026

Temperate hardwood logs and lumber international trade flows: a real quest for data

- FAO / Unece: coniferous VS non coniferous
- ComTrade: HS code
  Data are mostly estimated
  Errors not corrected
- Industry: mostly about softwood
- Magazine & Reports: Hardwood reported as a whole or too regional
- EOS: Not representing all of Europe



What competition do we face?



Concrete



Plastic furniture



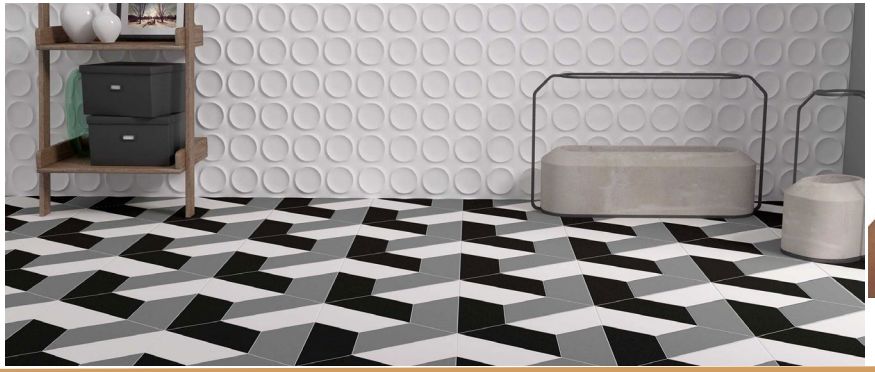
Aluminium





Glass

Vinyl flooring





Frabrics



Even oak face competition from other materials

A full life without oak and more sustainable (they say)



More affordable



More profitable



More Sustainable

Where do we stand in the lumber and wood products industry?

- Wooden panels & boards world production: 400 millions m3

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- Softwood lumber world production: 320 Millions m3

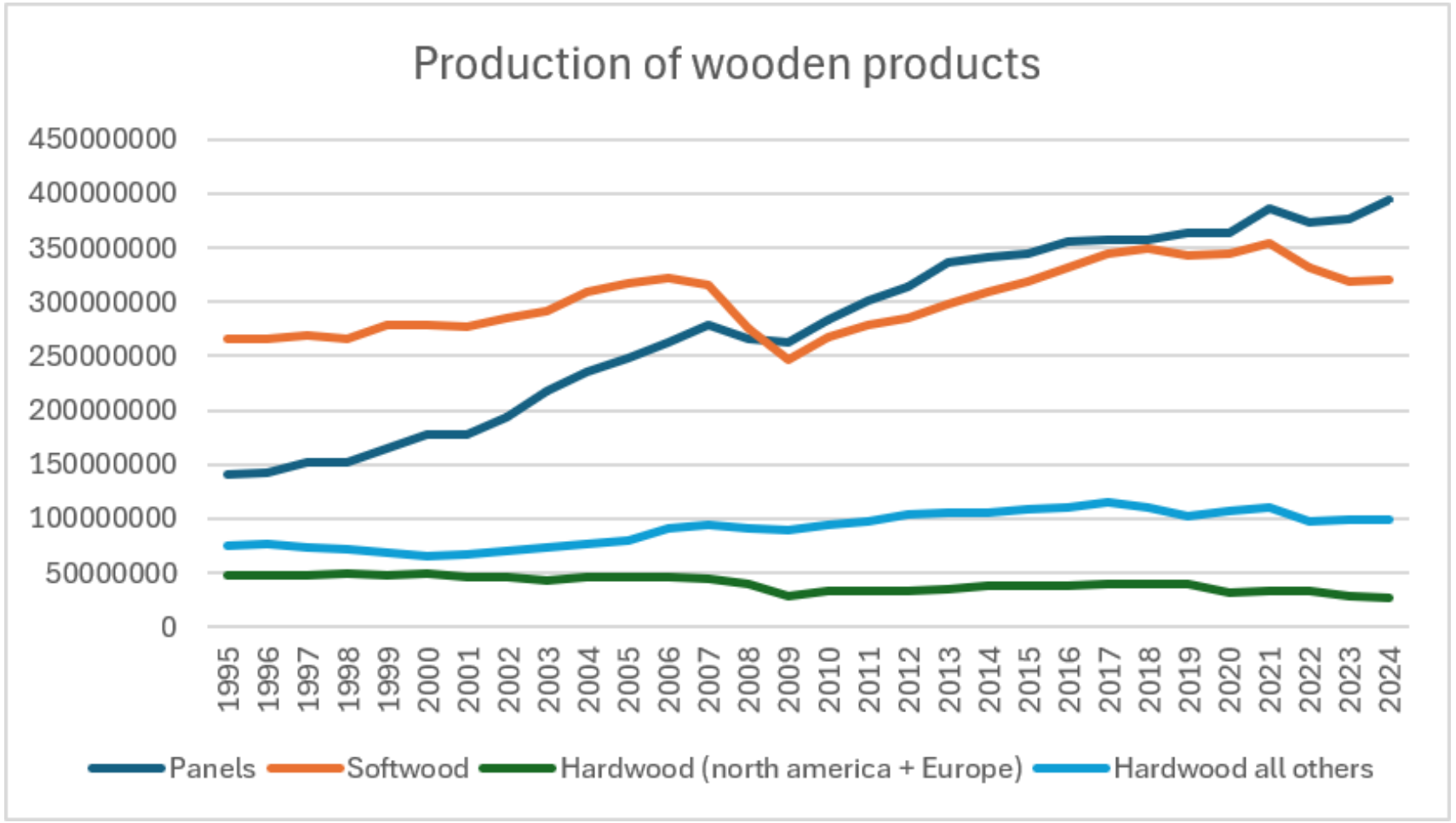
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- Global (Non-Coniferous) Sawnwood lumber production: 123 millions m3

843 millions m3

- Temperate hardwood lumber production: 26 millions m3 (3%)
- Europe's Hardwood lumber production: 12 millions m3 (1,4%)
- EOS Hardwood production: 5,7 millions m3 (0,7%)

From 530 millions m3 to 840 millions m3 (+ 58 %)



+ 178 %

+ 20 %

+ 32 %

- 46 %

Non coniferous logs trade: imports

TOP 15 GLOBAL INDUSTRIAL ROUNDWOOD (Non-Coniferous) IMPORTS • By Country (x000 m³)							
RANK 2024	COUNTRY	2020	2021	2022	2023	2024	% of World Total 2024
1	China	12,844	13,407	12,550	10,026	10,066	33.8%
2	Portugal	2,082	2,337	2,766	2,845	2,408	8.1%
3	India	1,547	2,210	2,310	1,858	2,345	7.9%
4	Sweden	2,582	2,339	2,416	2,296	2,193	7.4%
5	Vietnam	1,966	2,200	2,100	1,307	1,481	5.0%
6	Finland	4,740	4,830	1,584	1,252	1,297	4.4%
7	Belgium	1,935	1,957	2,215	1,322	1,153	3.9%
8	Italy	1,955	2,371	2,228	1,291	1,117	3.8%
9	Canada	1,053	1,203	1,144	1,023	1,094	3.7%
10	Austria	843	885	802	926	987	3.3%
11	Slovakia	450	653	923	633	863	2.9%
12	Spain	447	480	512	507	738	2.5%
13	Poland	519	443	822	495	392	1.3%
14	US	424	288	341	264	273	0.9%
15	Lithuania	115	107	99	128	256	0.9%
	Other	4,169	3,827	4,444	3,338	3,091	10.4%
	Grand Total	37,671	39,537	37,255	29,512	29,756	100.0%

Source: FAO/FEA

- Mainly eucalyptus logs from Spain and Brazil
- Birch logs from Baltic states +
- Mostly export of European logs

Non coniferous logs trade: Exports

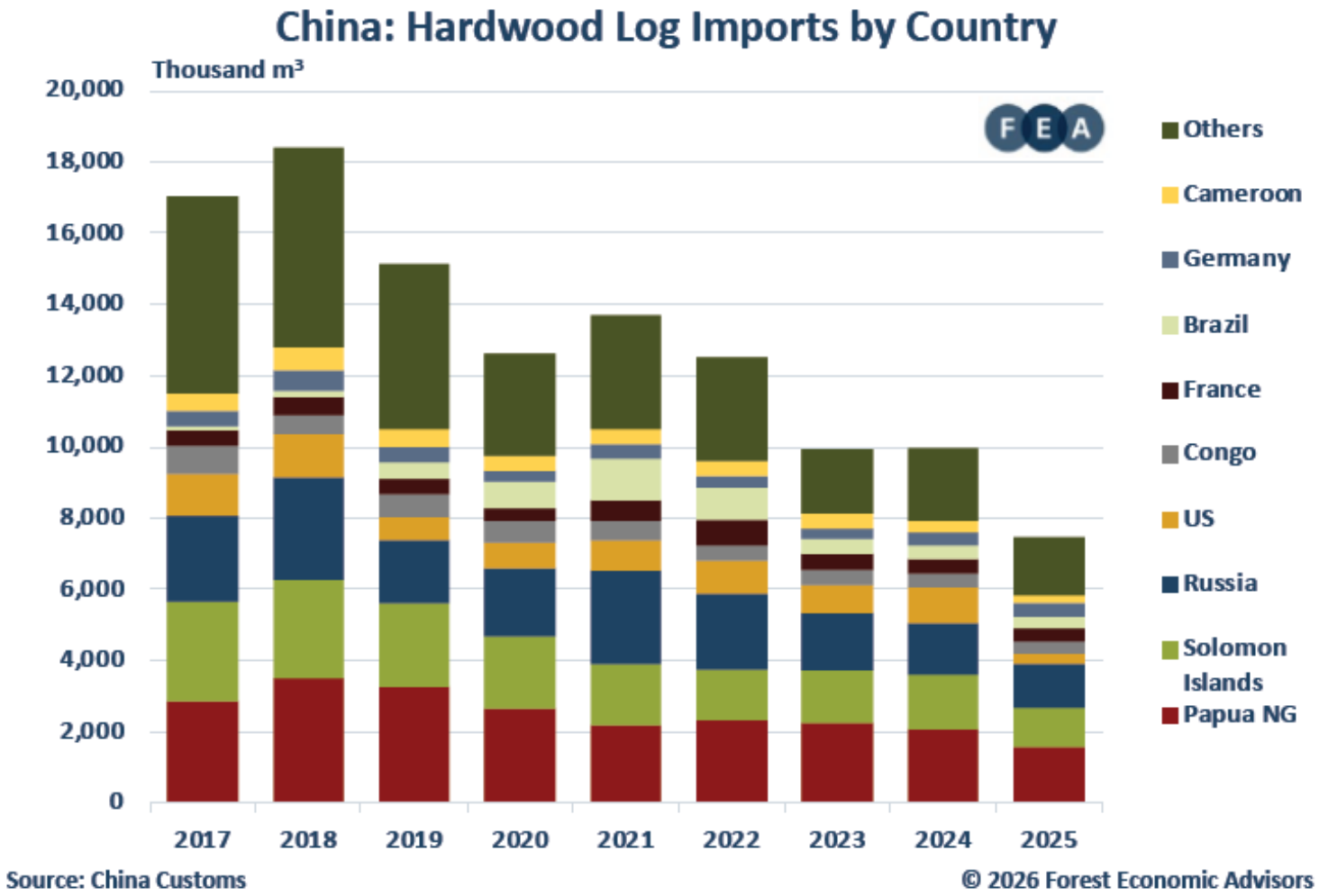
TOP 15 GLOBAL INDUSTRIAL ROUNDWOOD (Non-Coniferous) EXPORTS • By Country (x000 m³)							
RANK 2024	COUNTRY	2020	2021	2022	2023	2024	% of World Total 2024
1	Latvia	2,011	1,993	2,658	2,241	2,804	10.3%
2	Papua NG	2,900	2,500	2,924	2,490	2,313	8.5%
3	US	1,746	2,135	2,147	1,732	1,982	7.3%
4	France	2,146	2,507	2,616	2,251	1,844	6.8%
5	Solomon Isl.	2,180	1,857	1,624	1,621	1,624	6.0%
6	Brazil	1,370	2,060	2,279	1,473	1,473	5.4%
7	Russia	8,559	8,335	2,746	1,671	1,183	4.3%
8	Estonia	858	998	1,077	1,073	1,038	3.8%
9	Germany	1,027	1,026	871	913	1,010	3.7%
10	Slovakia	420	570	586	559	773	2.8%
11	Spain	704	532	660	859	741	2.7%
12	Slovenia	538	620	620	530	672	2.5%
13	Hungary	538	612	538	480	659	2.4%
14	Malaysia	1,040	602	305	645	645	2.4%
15	Poland	562	675	735	450	604	2.2%
	Other	10,197	11,136	10,145	8,344	7,888	28.9%
	Grand Total	36,796	38,158	32,530	27,331	27,252	100.0%

Source: FAO/FEA

- No main player
- Birch is a common industrial good
- All together Europe would be a leading exporter

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China’s logs imports

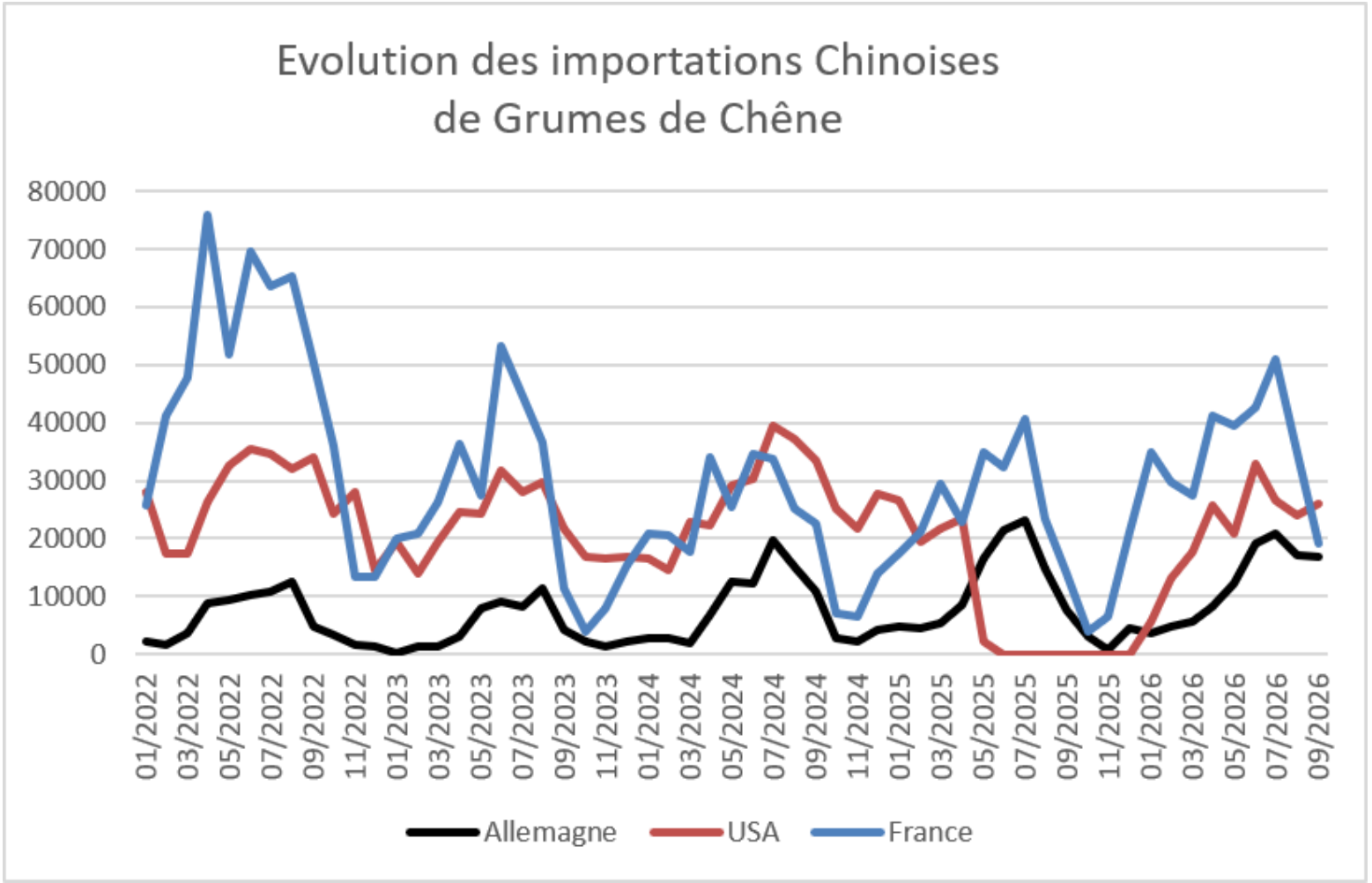


China’s logs imports: oak

China Imports: oak logs 44039100										
Pays	Civil year							Current year		
	2020	2021	2022	2023	2024	2025	*Evo 24/25*	YTD Jan-Sept 2025	YTD Jan-Sept 2026	*EVO YTD 2025/2026*
France	296 433	425 335	553 898	304 051	262 043	267 836	**2%**	245 104	320 229	**31%**
USA	223 373	325 471	325 028	263 197	320 120	93 556	**-71%**	90 097	192 207	**113%**
Allemagne	67 642	75 955	69 927	52 306	93 919	114 854	**22%**	109 557	107 793	**-2%**
Slovaquie	32 400	38 468	41 051	31 629	71 720	91 851	**28%**	75 893	96 226	**27%**
Czech Republic	2 471	13 299	29 263	16 927	36 518	43 979	**20%**	42 406	52 892	**25%**
Belgique	66 275	65 694	75 959	44 030	19 433	26 254	**35%**	19 375	27 519	**42%**
Slovenie	38 271	36 665	39 052	17 388	28 605	32 823	**15%**	30 294	21 392	**-29%**
Croatie	6 790	11 520	11 855	5 357	40 538	39 372	**-3%**	40 181	20 875	**-48%**
Pologne	1 858	5 108	2 754	2 394	1 914	4 513	**136%**	3 641	17 947	**393%**
Danemark	8 132	8 706	10 207	7 393	8 053	10 771	**34%**	9 846	9 521	**-3%**
Autriche	22	3 137	782	508	3 264	6 177	**89%**	6 056	6 425	**6%**
Canada	27 803	1 782	2 487	3 589	1 964	14 966	**662%**	8 358	4 642	**-44%**
Bulgarie	4 553	8 241	4 167	188	324	2 242	**592%**	2 841	3 244	**14%**
Serbie	13 923	29 913	21 185	4 419	15 076	2 784	**-15%**	4 274	3 170	**-26%**
Suede	617	14 955	3 852	6 151	18 088	32 956	**82%**	29 315	2 880	**-90%**
Bosnie Herzegovine	830	15 791	60 026	5 816	16 734	1 553	**-91%**	3 339	2 394	**-28%**
Luxembourg	962	951	1 548	1 269	298	-	**-100%**	0	689	
Roumanie	38 664	19 243	6 930	450	434	153	**-65%**	153	539	**252%**
Hollande	2 231	1 249	921	0	462	762	**65%**	1 339	428	**-68%**
Suisse	139	47	1 404	93	970	385	**-60%**	365	101	**-72%**
Espagne	0	262	999	0	5	13		0	-	
Russie	180 265	208 400	1 174	489	-	-		0	-	
Autres Pays	2 270	41 289	42 994	49 468	38 931	9 302	**-76%**	15 317	6 448	**-58%**
TOTAL	**1 015 924**	**1 351 481**	**1 307 463**	**817 112**	**966 631**	**797 102**	**-18%**	**737 751**	**897 561**	**22%**

China’s logs imports: oak

- Will USA takes first places?
- Will EUDR rules make a change?
- Will decreasing log prices boost a sluggish market?
- Will vietnam be the next China?
- How does that influence our lumber exports?

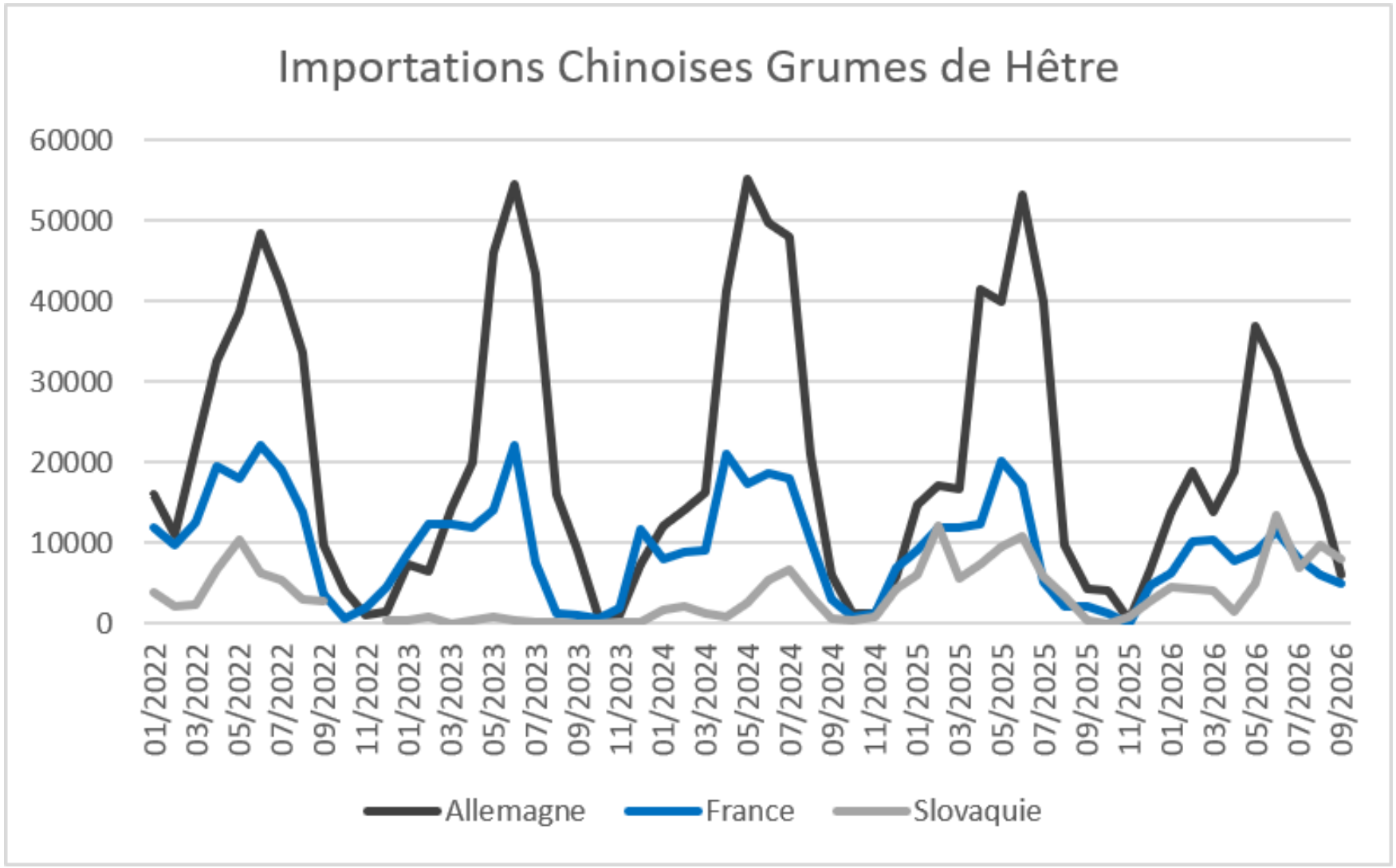


China’s logs imports: beech

Non coniferous logs trade

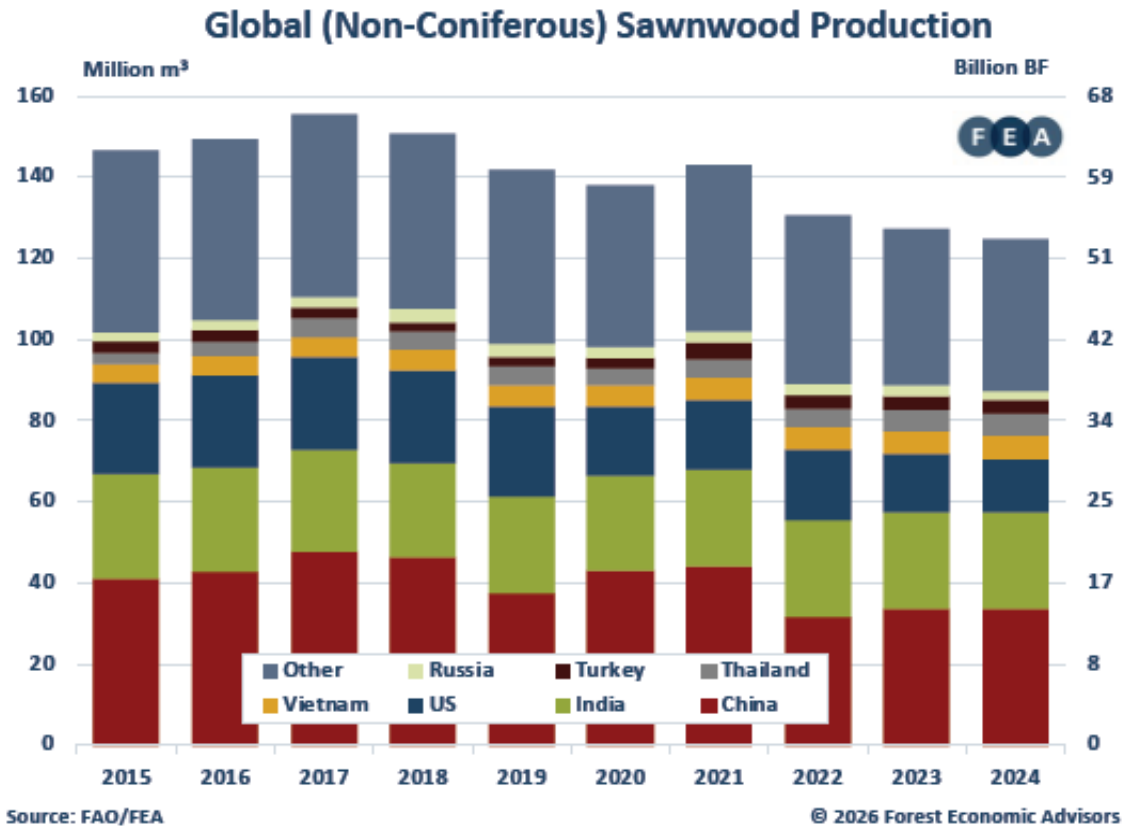
China imports: beech logs 44039200										
Pays	Civil year							Current year		
	2020	2021	2022	2023	2024	2025	*Evo 24/25*	YTD Jan-Sept 2025	YTD Jan-Sept 2026	*EVO YTD 2025/2026*
Allemagne	243 713	301 988	260 467	226 678	272 150	248 405	-8,7%	237 133	178 138	-24,9%
France	80 467	104 333	137 565	105 715	123 540	98 123	-20,6%	92 081	74 103	-19,5%
Slovaquie	3 145	47 103	43 288	3 476	30 304	64 702	113,5%	61 075	57 545	-5,8%
Danemark	62 476	61 897	55 975	60 891	54 767	52 097	-4,9%	45 467	45 434	-0,1%
Belgique	47 048	55 727	51 688	62 996	51 930	42 014	-19,1%	37 809	37 456	-0,9%
Rep Tchèque	10 575	25 661	35 559	5 955	16 773	27 174	62,0%	27 015	29 236	8,2%
Suède	9 650	7 740	7 317	8 809	10 448	15 790	51,1%	15 768	9 526	-39,6%
Pologne	24 547	43 663	16 605	9 973	13 740	7 327	-46,7%	5 034	7 497	48,9%
Luxembourg	7 086	8 466	10 208	4 818	6 371	5 569	-12,6%	5 569	6 131	10,1%
Suisse	20 291	17 979	20 368	12 167	15 496	15 574	0,5%	14 878	5 699	-61,7%
Slovenie	11 005	29 571	4 480	381	10 396	5 482	-47,3%	5 482	302	-94,5%
Roumanie	1 955	634	0	0	0	-		-	-	
Autres	725	5 882	26 754	2 449	2 900	1 077	-62,9%	1 077	1 012	-6,0%
Total	**522 683**	**710 644**	**670 274**	**504 308**	**608 815**	**583 334**	-4,2%	**548 388**	**452 079**	-17,6%

China’s logs imports: beech

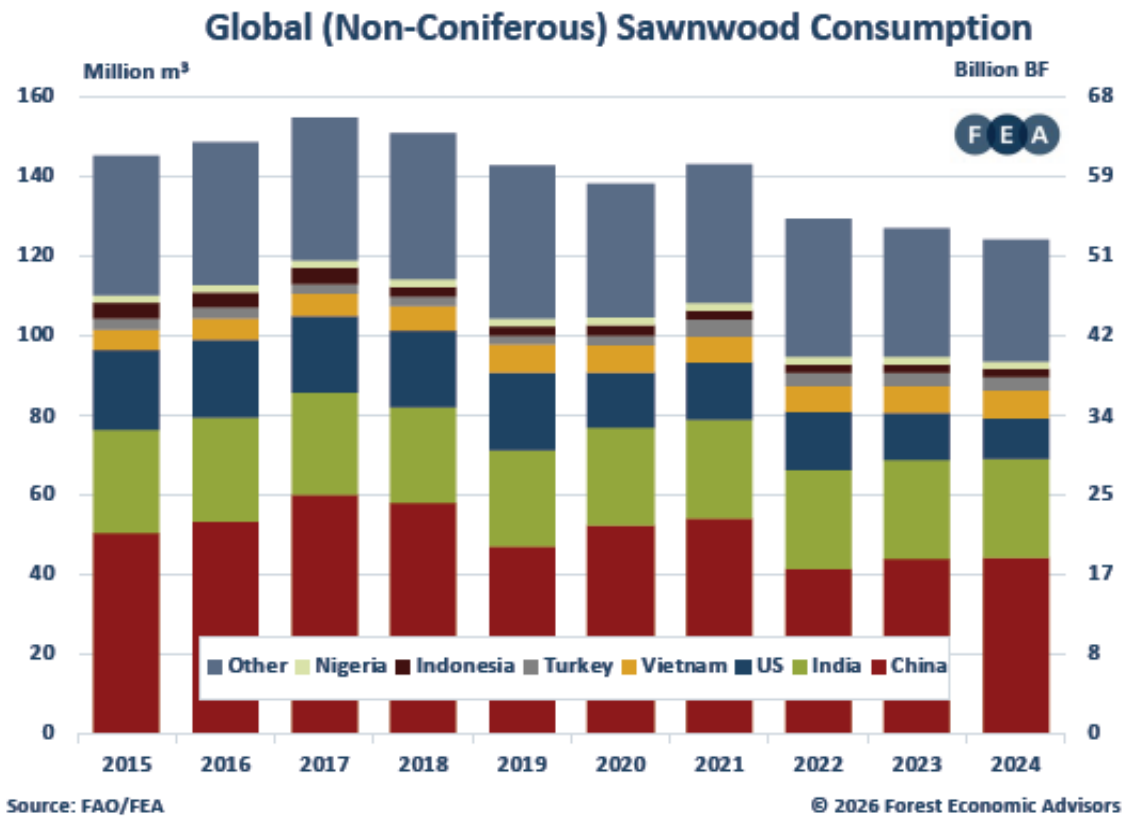


HARDWOOD SAWN TIMBER

Production



Consumption



Main trade:

TOP 15 GLOBAL SAWNWOOD (Non-Coniferous) IMPORTS • BY COUNTRY (Thousand m³)

RANK 2024	COUNTRY	2020	2021	2022	2023	2024	% of World Total 2024
1	China	9,738	10,311	10,150	10,505	10,718	48.2%
2	Vietnam	1,690	1,155	1,028	1,552	1,716	7.7%
3	India	665	999	1,033	1,049	1,007	4.5%
4	Canada	731	785	785	729	705	3.2%
5	US	630	717	799	626	639	2.9%
6	UK	541	536	612	484	498	2.2%
7	Mexico	394	539	583	476	433	1.9%
8	Italy	670	775	818	429	378	1.7%
9	Netherlands	349	343	314	322	357	1.6%
10	Kenya	68	343	282	252	252	1.1%
11	France	277	291	264	277	232	1.0%
12	Belgium	475	579	401	289	230	1.0%
13	Germany	409	502	420	272	230	1.0%
14	Iran	187	211	208	233	217	1.0%
15	Portugal	90	113	120	203	183	0.8%
	Other	6,560	7,133	6,336	4,992	4,433	19.9%
	Grand Total	23,472	25,331	24,154	22,691	22,227	100.0%

Source: FAO/FEA

TOP 15 GLOBAL SAWNWOOD (Non-Coniferous) EXPORTS • BY COUNTRY (Thousand m³)

RANK 2024	COUNTRY	2020	2021	2022	2023	2024	% of World Total 2024
1	Thailand	3,957	3,853	4,059	4,648	4,587	20.3%
2	US	3,511	3,695	3,782	3,256	3,418	15.1%
3	Gabon	871	738	1,116	894	1,172	5.2%
4	Russia	1,576	1,987	1,743	1,350	1,123	5.0%
5	Malaysia	1,325	1,235	1,151	1,253	972	4.3%
6	Cameroon	833	901	1,215	958	802	3.6%
7	Croatia	851	1,116	1,279	764	768	3.4%
8	Romania	502	543	461	500	600	2.7%
9	France	470	610	586	601	573	2.5%
10	Germany	702	782	721	504	528	2.3%
11	Philippines	257	477	485	596	499	2.2%
12	Latvia	462	640	697	377	468	2.1%
13	Canada	495	470	444	406	421	1.9%
14	Congo	97	362	346	382	370	1.6%
15	Italy	186	216	183	313	343	1.5%
	Other	6,957	7,560	6,947	6,032	5,938	26.3%
	Grand Total	23,051	25,185	25,214	22,833	22,582	100.0%

Source: FAO/FEA

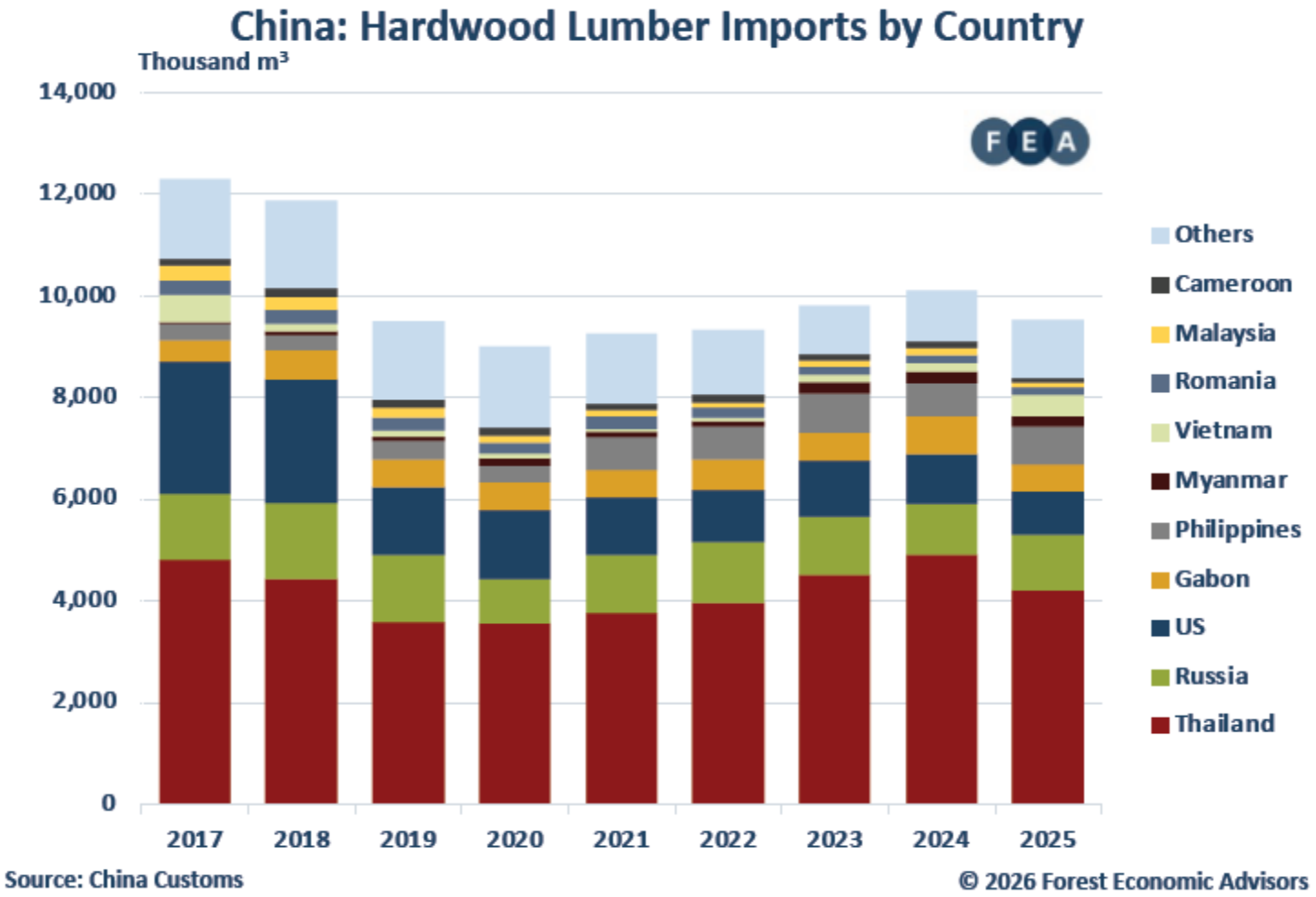
HARDWOOD SAWN TIMBER: imports from China

China:

Imports peak in 2017.

Main import is rubberwood from Thailande

Stable for the last 6 years



OAK SAWN TIMBER

Main trade:

USA is the main player mostly exporting to asia.

European producers are mainly shipping to other european markets

period	Exporter	Importer	cmdCode	M3	netWgt	USD cif	Average pr
2025	USA	China	440791	437 651	180 736 763	294 696 740	673
2025	USA	Viet Nam	440791	182 732	75 296 123	122 772 598	672
2025	USA	Canada	440791	237 982	71 666 042	116 853 642	491
2025	Croatia	Italy	440791	49 570	45 682 950	62 592 594	1 263
2025	France	United Kingdom	440791	54 203	49 944 379	54 835 166	1 012
2025	USA	United Kingdom	440791	82 402	31 511 838	51 381 002	624
2025	Italy	United Kingdom	440791	14 128	10 042 972	40 582 135	2 873
2025	Canada	China	440791	48 276	23 487 815	38 297 591	793
2025	USA	Mexico	440791	55 301	18 313 404	29 860 557	540
2025	France	Belgium	440791	30 417	25 884 656	27 918 251	918
2025	Austria	Germany	440791	18 383	12 855 469	26 293 311	1 430
2025	USA	Australia	440791	30 411	13 319 949	21 718 578	714
2025	Croatia	Germany	440791	10 264	8 738 022	20 997 892	2 046
2025	France	Germany	440791	16 058	13 352 514	19 266 930	1 200
2025	USA	Japan	440791	26 499	11 441 506	18 655 721	704
2025	France	Netherlands	440791	17 015	15 195 367	17 775 338	1 045
2025	Croatia	Viet Nam	440791	28 773	25 370 736	17 481 100	608
2025	Croatia	Austria	440791	265 201	17 143 962	16 885 577	64
2025	France	Switzerland	440791	8 853	5 749 142	16 507 827	1 865

OAK SAWN TIMBER: imports from China

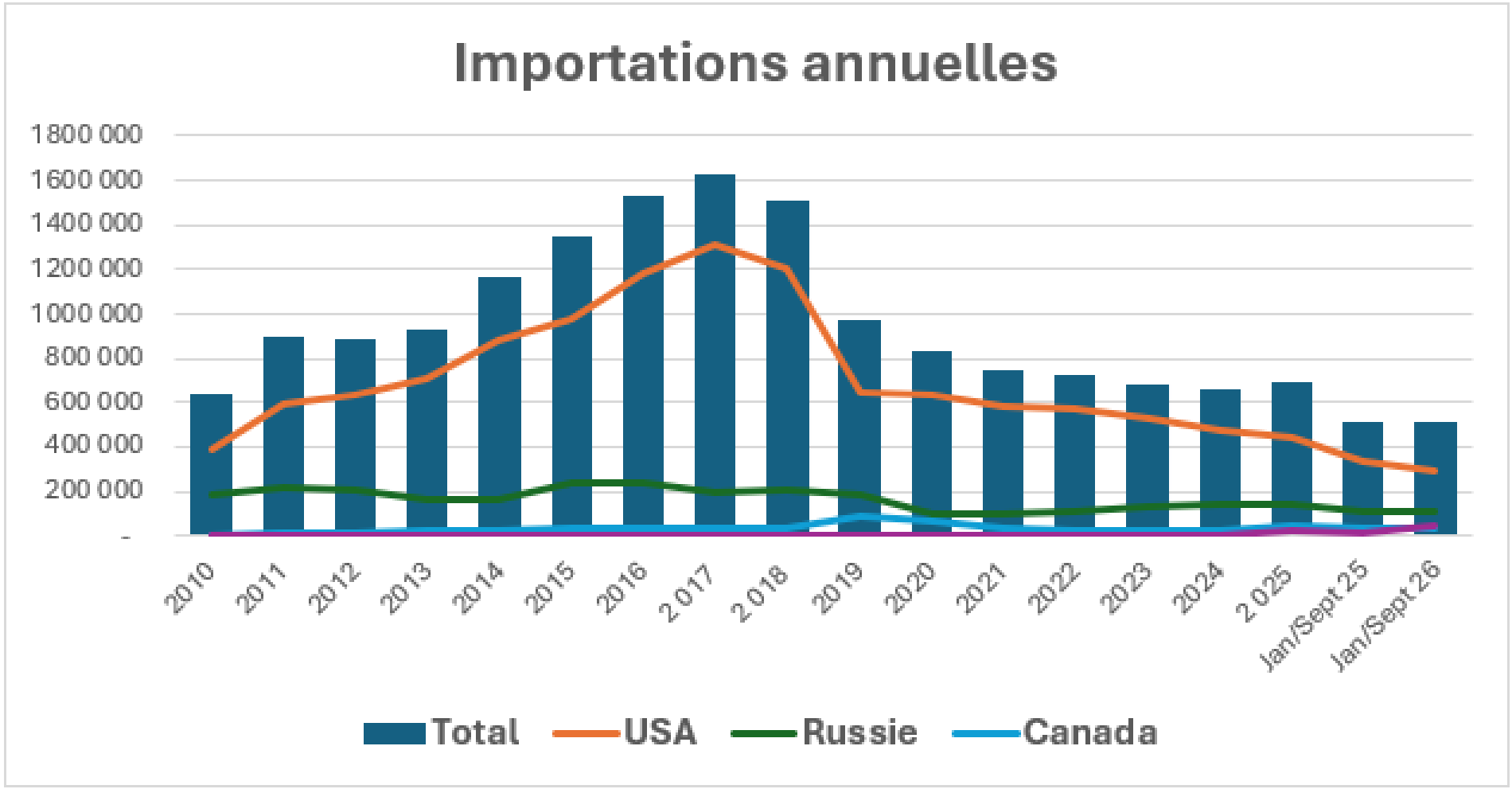
China:

Imports peak in 2017.

USA is the most affected

Russia has been stable in recent years due to limited market access

Overall the market decrease by more than 50 %



OAK SAWN TIMBER: imports from China

China:

Stable demand YtoY but change of trade flows

Diversification of import sources following trump first mandate

Vietnam is now the 3rd supplier following trump second mandate

Importations chinoises de sciages de chêne en m3 (440791)							
Pays	Années civiles				Année en cours		
	2023	2024	2025	Evo 24/25	Jan/Sept 25	Jan/Sept 26	Evo 25/26
Etats-Unis	522 684	476 220	446 038	*-6,3*	333 454	291 822	*-12,5*
Russie	127 402	138 607	140 839	*1,6*	110 529	112 895	*2,1*
Vietnam	40	979	24 529	*2 405,5*	8 952	41 949	*368,6*
Canada	18 670	21 968	46 650	*112,4*	30 994	36 080	*16,4*
Croatie	2 362	7 704	21 486	*178,9*	14 564	15 814	*8,6*
France	1 836	3 733	3 829	*2,6*	2 720	4 518	*66,1*
Hongrie	2 492	2 733	4 641	*69,8*	3 255	3 524	*8,3*
Roumanie	373	1 283	2 214	*72,6*	1 486	2 299	*54,7*
Allemagne	1 436	1 304	2 393	*83,5*	2 149	1 247	*-42,0*
Pologne	0	41	793	*1 834,1*	562	873	*55,3*
Serbie	0	847	1 018	*20,2*	702	770	*9,7*
Autres	3 275	3 785	4 044	*6,8*	3 243	4 002	*23,4*
Monde	**680 570**	**659 204**	**698 474**	***6,0***	**512 610**	**515 793**	***0,6***

OAK SAWN TIMBER: Exports from France

Export from france:

French market is slowing so export is crucial to maintain production and turnover.

Asian markets are increasingly quiet

Europe is gaining momentum even if they have always been the main destination.

Main issue is to find markets for QS2 type production

Exportations francaises de sciages de chêne en m3 (440791)							
Pays	Années civiles				Année en cours		
	2023	2024	2025	Evo 24/25	Jan/Juin 25	Jan/Juin 26	Evo 26/26
Royaume Uni	47 714	51 810	50 377	*-2,8*	27 300	27 728	*1,6*
Belgique	24 173	22 534	24 050	*6,7*	12 750	16 291	*27,8*
Allemagne	14 657	16 896	16 792	*-0,6*	9 093	10 455	*15,0*
Pays-Bas	14 616	11 814	15 037	*27,3*	7 834	8 663	*10,6*
Etats-Unis	1 262	1 969	6 175	*213,7*	3 303	7 100	*115,0*
Italie	7 925	7 075	6 850	*-3,2*	3 355	5 666	*68,9*
Suisse	10 971	9 198	9 256	*0,6*	4 634	4 291	*-7,4*
Inde	3 342	5 078	4 686	*-7,7*	2 493	3 313	*32,9*
Espagne	8 122	5 229	5 655	*8,1*	3 116	2 887	*-7,3*
Chine	4 727	6 310	5 080	*-19,5*	2 522	2 766	*9,7*
Portugal	2 770	3 406	3 974	*16,7*	2 131	2 698	*26,6*
Indonésie	2 003	1 353	2 390	*76,7*	1 571	2 342	*49,1*
Croatie	470	329	2 096	*537,0*	929	1 647	*77,4*
République Tchèque	802	1 483	1 752	*18,1*	830	1 423	*71,4*
Autriche	541	502	727	*44,7*	299	1 295	*333,1*
Pologne	715	538	395	*-26,6*	73	1 291	*1 667,3*
Autres	22 694	20 175	17 508	*-13,2*	8 031	6 357	*20,8*
Monde	**167 503**	**165 700**	**172 799**	***4,3***	**90 263**	**106 213**	***17,7***

Source : Données Eurostat corrigées par FrenchTimber

BEECH SAWN TIMBER

Main trade:

Europe is the main producer

China is the main buyer

There is some very specific trade between countries:

- company's specific
- Historic relation
- Geo political
- Product category

perio	Exporter	Importer	cmdCod	M3	netWgt	USD cif	Average pric
2025	Croatia	Egypt	440792	327 302	312 236 008	81 378 087	249
2025	Romania	China	440792	140 095	106 202 041	68 439 561	489
2025	Germany	China	440792	100 011	79 350 972	48 995 987	490
2025	Germany	USA	440792	51 020	33 988 987	34 948 496	685
2025	Croatia	China	440792	55 635	49 873 438	26 551 878	477
2025	Serbia	China	440792	57 078	46 484 019	24 810 076	435
2025	Poland	China	440792	51 852	44 949 892	19 959 809	385
2025	Türkiye	Iran	440792	95 770	96 422 906	19 271 951	201
2025	Slovakia	Poland	440792	61 345	49 547 539	19 029 258	310
2025	Croatia	Italy	440792	37 545	32 857 739	17 287 313	460
2025	Slovenia	Italy	440792	34 061	28 535 726	17 013 522	499
2025	Bosnia Herzegovina	Germany	440792	17 069	11 936 265	15 732 879	922
2025	Serbia	United Arab Emirates	440792	26 999	20 265 937	15 717 155	582
2025	Germany	Poland	440792	32 744	22 731 634	13 300 148	406
2025	Germany	Mexico	440792	16 347	11 046 789	12 184 169	745
2025	Romania	Egypt	440792	31 782	25 791 763	11 447 365	360
2025	Bosnia Herzegovina	Croatia	440792	30 232	21 141 076	10 568 711	350
2025	Germany	France	440792	11 613	7 875 190	10 421 185	897
2025	Romania	Lebanon	440792	28 951	23 195 854	10 148 248	351
2025	France	Algeria	440792	17 964	13 799 847	10 066 548	560

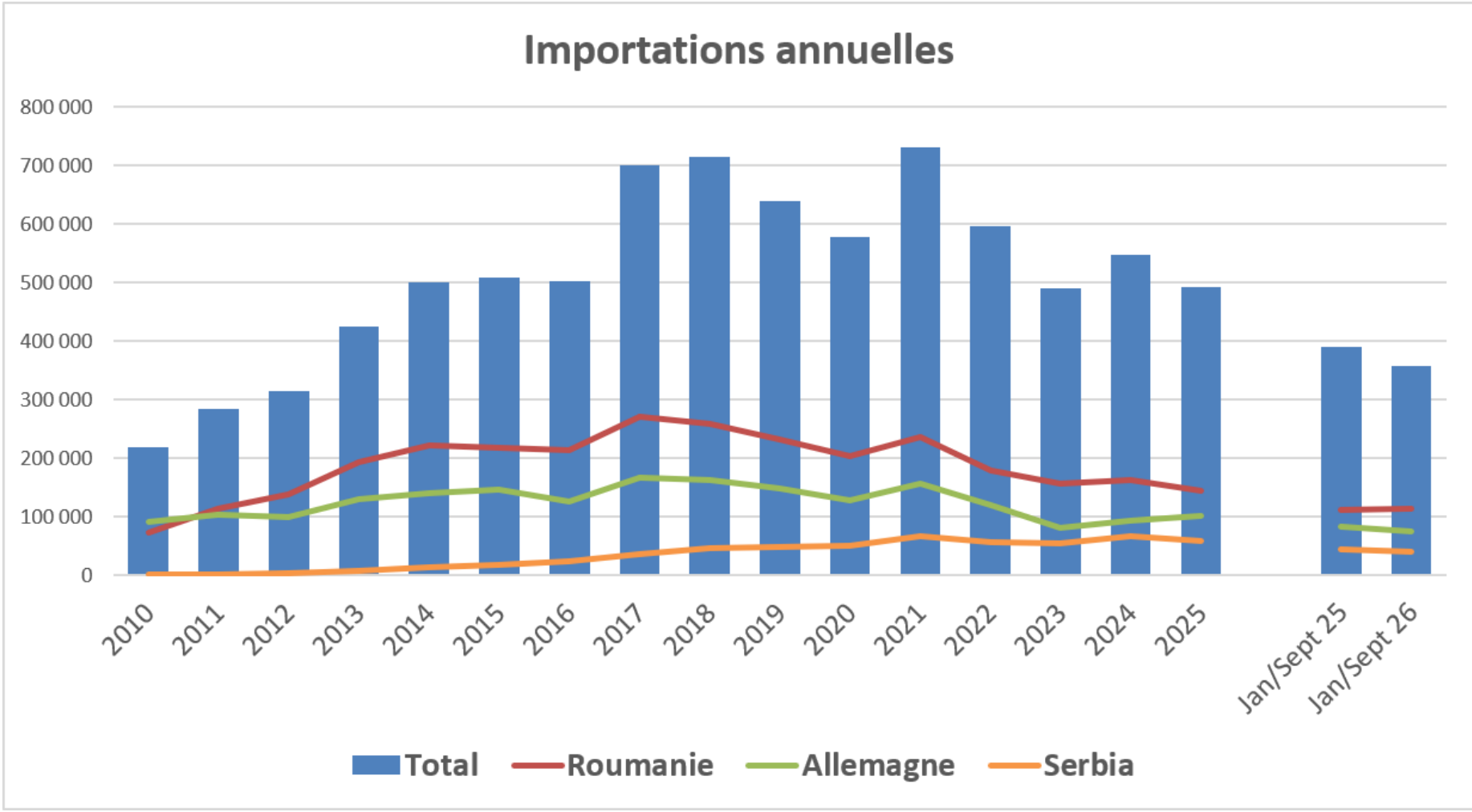
BEECH SAWN TIMBER: imports from China

China:

Demand is on a decreasing trend since it's 2018 peak

2021 was a side effect of inflation on other specie

Romania was the most affected



BEECH SAWN TIMBER: imports from China

China 2026:

Romania is stable

While all others main producers are loosing volume due to slugish market and uncertainty

Pays	Années civiles				Année en cours		
	2023	2024	2025	Evo 24/25	Jan/Sept 25	Jan/Sept 26	Evo 25/26
Roumanie	155 528	163 382	144 601	*-11,5*	111 543	113 069	*1,4*
Allemagne	80 551	93 278	101 409	*8,7*	82 985	75 346	*-9,2*
Croatie	64 004	82 125	57 717	*-29,7*	47 247	41 651	*-11,8*
Pologne	53 571	57 758	55 811	*-3,4*	44 281	39 100	*-11,7*
Serbie	54 257	65 866	58 739	*-10,8*	44 483	38 839	*-12,7*
Bosnie Herz	31 442	36 672	28 843	*-21,3*	22 291	23 637	*6,0*
France	21 254	21 840	14 808	*-32,2*	13 513	9 568	*-29,2*
Austriche	7 862	8 360	11 255	*34,6*	8 235	7 404	*-10,1*
Slovaquie	3 556	2 857	3 339	*16,9*	2 541	2 603	*2,4*
Hongrie	7 409	4 569	6 110	*33,7*	4 625	1 809	*-60,9*
Slovenie	591	709	2 154	*203,8*	1 496	1 735	*16,0*
Italie	5 449	5 845	6 044	*3,4*	5 517	903	*-83,6*
Montenegro	973	1 419	750	*-47,1*	750	592	*-21,1*
Autres	3 363	1 851	1 302	*-29,7*	1 002	738	*-26,3*
TOTAL	**489 810**	**546 531**	**492 882**	***-9,8***	**390 509**	**356 994**	***-8,6***

BEECH SAWN TIMBER: exports from France

Export from france:

Slow erosion of volume exported over the years

Some markets are closing while others are reopening

Exportations francaises de sciages de hêtre en m3 (440792)							
Pays	Années civiles				Année en cours		
	2023	2024	2025	Evo 24/25	Jan/Juin 25	Jan/Juin 26	Evo 25/26
Belgique	24 391	24 478	25 754	*5,2*	12 886	13 419	*4,1*
Algérie	18 973	16 671	18 257	*9,5*	9 396	11 911	*26,8*
Chine	18 087	19 531	11 107	*-43,1*	8 765	7 627	*-13,0*
Tunisie	9 112	7 637	8 142	*6,6*	3 897	5 117	*31,3*
Espagne	16 941	12 361	11 742	*-5,0*	8 111	4 281	*-47,2*
Luxembourg	4 873	5 927	6 202	*4,6*	3 398	3 743	*10,2*
Vietnam	6 059	8 627	6 833	*-20,8*	4 272	3 665	*-14,2*
Inde	2 908	3 458	5 738	*65,9*	2 665	2 802	*5,1*
Portugal	9 340	5 273	6 362	*20,7*	3 269	2 708	*-17,2*
Allemagne	5 545	5 944	5 341	*-10,1*	2 851	2 107	*-26,1*
Suisse	3 102	2 063	1 483	*-28,1*	678	1 462	*115,6*
Emirats Arabes Unis	1 011	1 494	1 475	*-1,3*	714	668	*-6,4*
Royaume Uni	634	854	1 102	*29,0*	481	524	*8,9*
Nouvelle Calédonie	6	0	16	*#DIV/0!*	5	482	*10 330,4*
Maroc	2 920	436	28	*-93,6*	28	438	*1 464,3*
Autres	5 335	5 759	1 906	*-66,9*	1 122	434	*-61,3*
Monde	**129 237**	**120 514**	**111 488**	***-7,5***	**62 537**	**61 388**	***-1,8***

Source : Données Eurostat corrigées par FrenchTimber

Can the hardwood industry find its way back to growth without correct and sufficient datas ?





Rise & fall of empires: controlling the added value



Or may be we just take the cherry on the cake



Questions

