

ETTF OUTLOOK 2025/2026



73rd International

SOFTWOOD CONFERENCE

OSLO 2025 | 22-23 October

Morten Bergsten – Vicepresident ETTF

Facts in import 2024 – Members importing > 1 mio. m3



1000 m3 sawn softwood			
Country		forecast import 2024	Actual import 2024
Austria		1.380	1.415
Belgium		1.100	1.200
Denmark		1.100	1.165
France		2.000	2.080
Germany		2.760	2.895
Italy		4.030	4.030
Netherlands		2.650	2.920
Spain		960	1.125
Sub. Total		15.980	16.830
UK		5.570	5.810
USA		26.145	25.565
Total		47.695	48.205

+ 5,4%

Facts in consumption 2024

1000 m3 sawn softwood			
Country		Forecast October 2024	Act. 2024
Austria		5.465	5.360
Belgium		1.470	1.660
Denmark		1.120	1.355
France		7.500	7.470
Germany		15.650	16.430
Italy		4.615	4.700
Netherlands		2.650	2.470
Spain		3.390	3.310
Sub. Total		41.860	42.755
UK		8.310	8.775
USA		85.860	85.640
Total		136.030	137.170

+2,1%

+0,85%



Import and consumption 2025 / 2026



1000 m3 sawn softwood						
Country		Est. Import 25	Forecast 26		Est. Consumption 25	Forecast 26
Austria		1.500	1.500		5.100	5.200
Belgium		1.200	1.200		1.700	1.700
Denmark		1.300	1.300		1.490	1.500
France		2.050	2.150		7.300	7.500
Germany		3.600	3.800		16.900	17.250
Italy		4.280	4.140		5.030	4.750
Netherlands		2.950	3.000		2.510	2.490
Spain		1.215	1.250		3.475	3.540
Sub. Total		18.095	18.340		43.505	43.930
UK		5.840	5.840		8.830	8.830
USA		24.592	21.950		83.510	86.415
Sub. Total		48.527	46.130		135.845	139.175
Other countries at the ISC (CA-SE-NO-FI-CH-LV-RO-MA-PL)					29.500	29.715
Total					165.345	168.890

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Very small increase
in both import and
consumption

← But app. 1,2 mio m3
more than 2024

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US -10,7%

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US import -10,7%

But +3,5% in consumption

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Added countries doesn't change the picture

The increase is driven by US

Production



		2024	Forecast for 2025 given at ISC 2024	2025	2026
	<i>Unit</i>				
Germany	<i>1.000 m³</i>	22.367	22.250	21.250	21.250
Sweden	<i>1.000 m³</i>	17.800	17.100	17.800	17.800
Finland	<i>1.000 m³</i>	10.900	10.000	11.700	11.700
Austria	<i>1.000 m³</i>	9.700	9.900	9.900	10.000



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Sweden	<i>1.000 m³</i>	17.800	17.100	17.800	17.800
Finland	<i>1.000 m³</i>	10.900	10.000	11.700	11.700
Austria	<i>1.000 m³</i>	9.700	9.900	9.900	10.000

Very stable...
almost too
stable 😊





Examples of tendencies



Region	2026 GDP Trend	Construction Outlook	Softwood Market Trend	Key Drivers
Belgium	Stable	Weak recovery	↔ Neutral	Competition, low demand
Denmark	Positive	Moderate recovery	↑ Rising	Green transition, lower rates
France	Stable	Moderate recovery	↗ Mild rise	Green transition, increasing building permits
Germany	Stable	Gradual rebound	↗ Mild rise	Public works, energy renovation
Netherlands	Moderate	Growing	↗ Rising	Biobased building policies
Italy	<u>Weak</u>	Stabilizing	↔ to ↘ small drop	<u>PNRR</u> , trade recovery
Spain	Strong	Expanding	↑ Rising	Housing deficit, renovation





EUTR

European Union Timber Regulation



Platinum



Gold



Silver



Bronze*

Total performance index	80% and higher	65% and higher	50% and higher	35% and higher
Minimum performance index	65%	50%	35%	-- %

* This award only applies to certification of existing buildings/the Buildings in Use certificate.



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This leads me to a few key takeaways

1. 2025 has been a turbulent year on the political front, but **Europe is recovering and will stand strong again.**
2. This recovery brings great opportunities for trade organizations such as **EOS/CEI BOIS/ETTF etc.— by standing together and securing the best possible position on the European stage in Brussels.**
3. Wood remains one of the main drivers of the green transition. We must ensure it stays that way — **we are all working toward the same goal.**
4. Consumption in the EU is forecast to increase by around 2.5% compared to 2024. However, this **growth still doesn't fully align with the pace needed for the green transition,** as we remain more or less at last year's level.

Europe is on the path to recovery, and our business — our trade, our industry — is looking ahead to a slightly more positive 2026.

Despite many uncertainties, especially on the political and regulatory level

wood remains the future — naturally.

THANK YOU



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