Market report

Softwood lumber

Tariffs, turbulence and new trade flows

Global outlook 2025-2030

October 2025

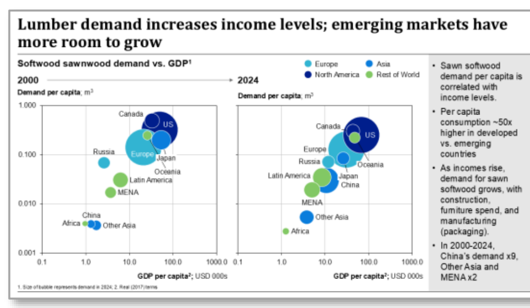
O'Kelly Acumen   global wood trends

Softwood lumber markets globally are emerging from several years of weak demand and now face new trade restrictions that could dramatically reshape global trade. U.S. import tariffs, a property crisis in China, and war in Europe all add to uncertainty in the years ahead. This report provides a thorough overview of recent market developments, perspectives on key trends shaping future market evolution, and forecasts and scenarios for global demand, supply, and trade.

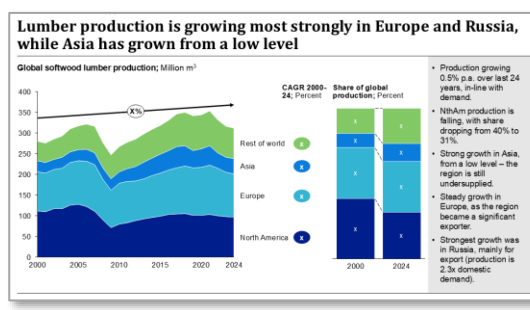
Contents

Example exhibits

Demand per capita vs. GDP per capita by region, 2000-2024



Global lumber supply growth by region, 2000-2024



Main lumber trade flows, largest exporters and importers, 2024

Questions the report helps answer

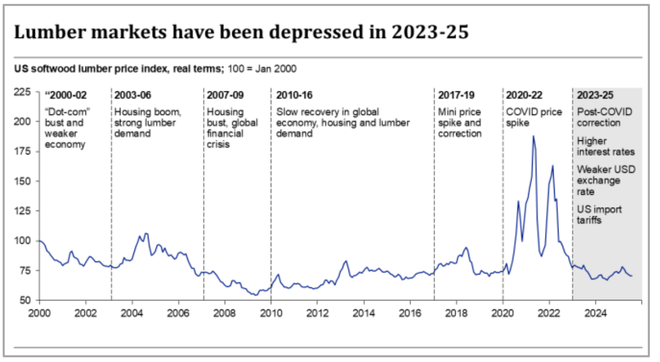
- How will the new US import tariffs impact the US, Canada and global markets?
- What is the outlook for China's struggling construction sector?
- When will growth return to US and European lumber demand?
- Can Europe increase lumber production and export when demand growth returns?
- What is happening with Russia's industry, with limited access to global markets?
- What would an end of the war in Ukraine mean for European lumber markets?
- Beyond China, what emerging markets have strong growth potential?
- How will the global supply and demand balance evolve in 2025-2030?

Who the report is most relevant for

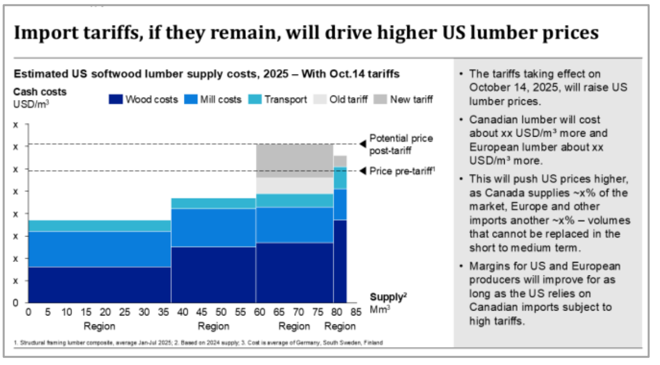
- **Sawmill owners** / operators globally.
- **Lumber buyers**, including construction, packaging and furniture manufacturers.
- **Lumber traders** and **wholesalers**.
- **Forest owners** and **investors** globally.
- **Pulp**, **panel** and **pellet industries** using sawmill residues.
- Suppliers of **sawmill equipment** and technology.
- **Analysts**, **consultants**, **financial institutions** and **industry associations**.

Example exhibits

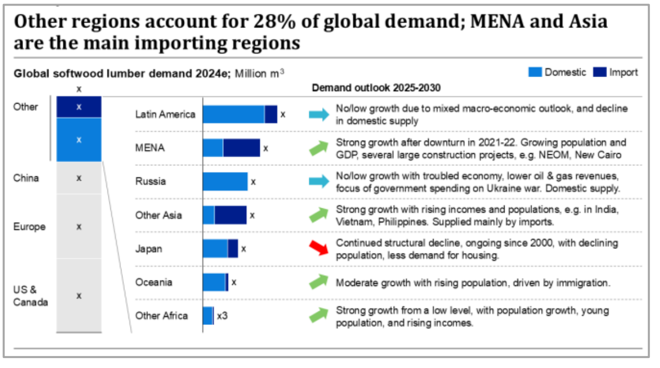
Analysis of lumber price evolution 2000-25



Potential impact of new import tariffs on US prices



Domestic demand and imports outlook by region



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- **Single-user license:** USD 2900
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- **Data (additional)**: USD 750

What you get:

- 105-page report in easy-to read slide format
- Authors available for a 45 min interview

Contact us for more information

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