

American Hardwood Export Council Europe Market Report

June 2025



The No.1 Common exhibition put the spotlight firmly on the untapped potential of No.1 Common grade hardwoods—read more [here](#).

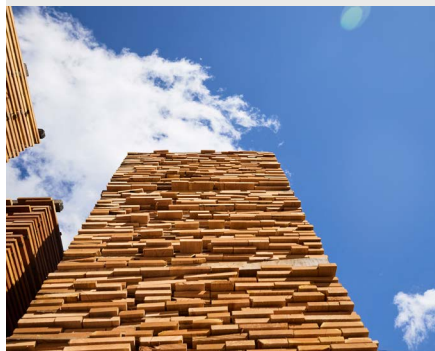
MARKET UPDATE



**AHA PLATFORM DUE TO BE
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MARKET UPDATE



**UNCERTAIN GEOPOLITICS
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**NO.1 COMMON MAKES MAJOR
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MARKET UPDATE

AHA Platform due to be launched on 31 July

The American Hardwood Assured (AHA) platform for delivery of legal and deforestation-free U.S. hardwood is now on track to be launched on 31 July. From that date the platform will be freely available to any U.S. organisation engaged in the American hardwood export trade. Additional information and an invitation to sign up to the regular AHA newsletter can now be accessed at www.hardwood.us, AHA's new online home. The platform together with instructions on how to register to use the platform and a range of online training material will be accessible via www.hardwood.us from the launch date. AHEC will host a webinar for all interested parties to introduce the platform, probably in the first week of August.



The American Hardwood Assured (AHA) platform will be freely available to any U.S. organisation engaged in the American hardwood export trade from July 31.

The platform is designed to provide exporters with a straightforward procedure to quickly prepare standardised AHA Statements with each consignment, containing the data needed to confirm negligible risk of illegal harvesting and deforestation at the original source of the hardwood. Users are provided with a point-and-click tool to select the specific U.S. counties where the logs contained in their export consignments are harvested. From this, a separate geojson file is generated, containing the geolocation data required for EUDR conformance by their overseas customers.



Feedback has been almost universally positive, most stating the legal and deforestation-free assurance provided by the AHA Statements goes well beyond the requirements of EUDR.

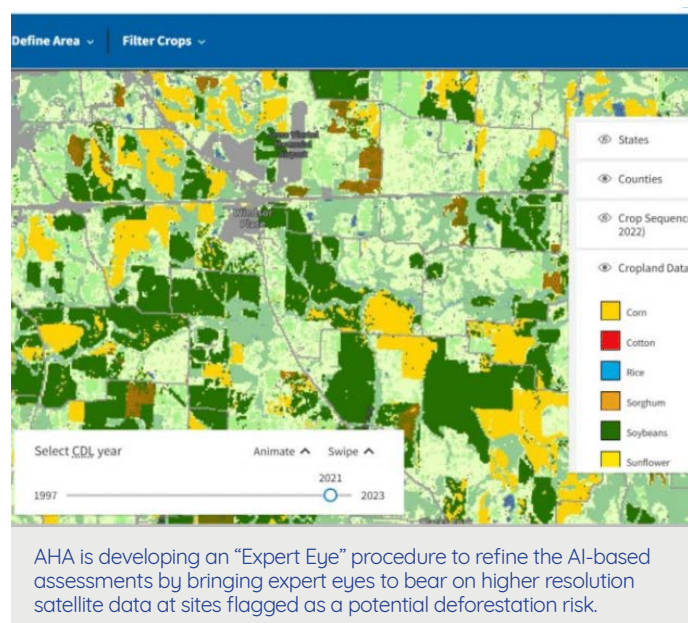
A few final tweaks are now being made based on feedback from the most recent round of consultations with EU importers. These are mainly designed to ensure that each AHA Statement can be reliably linked to, and is unique to, a specific identifiable consignment. Similar to when the platform was demonstrated at Interzum, Cologne in May, feedback from importers during the latest round of consultations has been almost universally positive, with most stating the legal and deforestation-free assurance provided by the AHA Statements goes well beyond the requirements of EUDR.

The legality assurance is underpinned by one of the most comprehensive series of assessments of the risk of illegal harvesting ever undertaken anywhere in the world. 33 individual assessments, one for each of the U.S. states producing commercial volumes of hardwood, have been prepared so far. Following a rigorous process of independent analysis, stakeholder consultation, and peer review, the team of forest governance experts, appointed by AHA, confirmed a negligible risk of illegal activity in all 33 states—which collectively account for over 97% of all commercial hardwood harvesting in the United States. When the platform is launched, 37 states accounting for over 99% of commercial hardwood harvesting will have been assessed.

The deforestation risk assessment underpinning the platform at launch draws on an AI-based assessment of forest and other land-use changes, identified by comparing the USDA Crop Data Layer



(CDL) for 2024 with 2020. The CDL is itself compiled from a nationwide annual assessment of Landsat and Sentinel-2 satellite images, prepared by the US Department of Agriculture each year. AHA is developing an innovative “Expert Eye” procedure to refine the AI-based assessments by bringing expert eyes to bear on higher resolution satellite data at sites flagged as a potential deforestation risk. This unique feature promises to provide one of the most accurate quantitative assessments of deforestation risk in any commodity sector anywhere in the world.



AHEC is now reviewing a first draft of an expert legal opinion commissioned to provide legal backing, under EU law, of AHA’s provision of geolocations of U.S. counties, rather than plots within individual properties in the context of forest products from demonstrably negligible risk jurisdictions. A statement summarising the legal opinion will be published on the [AHA website](#). This same statement will also be linked to users’ AHA Statements. The legal opinion will also be used in support of ongoing AHA communication in the European and wider global marketplace.

Oak drives 9% rise in lumber exports to Europe

In the first five months of 2025, the U.S. exported 153,500m³ of hardwood lumber to European countries with a total value of \$106.8 million, respectively 9% and 10% more than the same period last year. The growth was heavily focused on oak, with exports of white oak lumber up 13% to 74,400m³ and red oak lumber rising 45% to 28,800m³. There were also

strong percentage increases in exports of other (“not elsewhere stated”) hardwoods, which increased 43% to 5,700m³, and in maple which increased 31% to 1,300m³. Walnut was stable at 7,400m³; however, tulipwood declined 20% to 25,300m³, ash was down 10% to 8,200m³, and hickory fell 17% to 1,600m³.

The overall rise in trade so far this year comes against a background of relatively slow economic growth in Europe and sluggish demand in key sectors such as joinery and furniture. Supply side factors and exchange rates have likely played a role in driving the trend. Between January and June this year, the euro appreciated by around 15% against the dollar, while the British pound strengthened by 11%, contributing to improved price competitiveness. This will likely have boosted demand for white oak which is currently readily available, particularly for thinner sizes and shorter lengths. Tulipwood on the other hand is less readily available, particularly the upper grades for which there is strong demand from custom cabinet manufacturers in the United States.



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Pace of lumber exports to the UK close to record levels

Much of the growth in exports to Europe this year has been concentrated in the UK. Exports of 64,900m³ to the UK in the first five months of 2025 were 19% more than the same period last year. Much of this growth was concentrated in white oak (+26% to 40,600m³) and red oak (+82% to 3,700m³). The pace of exports to the UK so far this year is not far short of 2021, a



record year when the market was booming in the immediate aftermath of the pandemic.

The UK economy is hardly booming this year, but the first quarter saw a stronger-than-expected start, with 0.7% growth. The UK has also managed, so far, to steer clear of the trade wars after deciding not to retaliate against the U.S. tariffs and reaching an early trade agreement with the Trump Administration. Construction sector indices for the UK, while pointing to only moderate growth, are also more favourable than other large European economies.

Subdued lumber exports to the EU

U.S. hardwood lumber exports to other European countries were much more subdued compared to the UK in the first five months of 2025. Total exports to all EU countries were 85,600m³ during this period, just 3% more than the same period last year. There was strong growth in exports to a few EU countries including Portugal (+34% to 9,400m³), Ireland (+13% to 6,700m³), Estonia (+167% to 5,400m³), Greece (+9% to 3,300m³), and France (+46% to 2,100m³).



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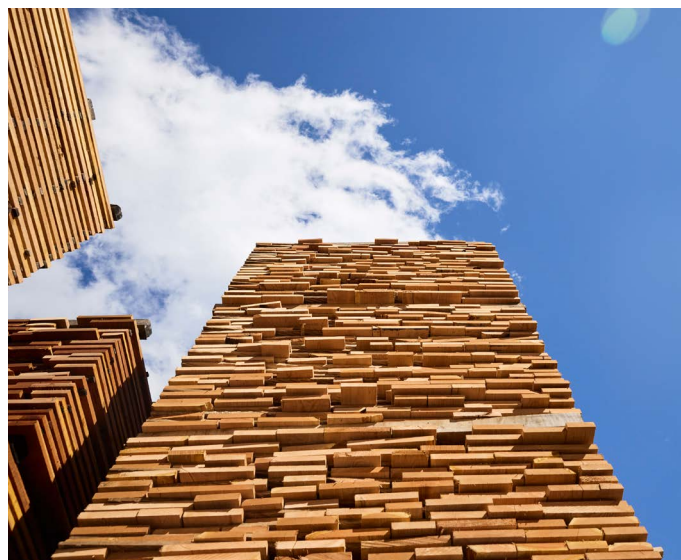
However, exports to the two largest EU markets for U.S. hardwood lumber—Italy (+1% to 16,200m³) and Germany (+4% to 15,400m³)—were up only slightly after a downturn last year. Exports to Spain (-12% to 10,300m³), Belgium (-25% to 3,400m³), and Sweden (-37% to 3,100m³) were all down sharply compared to the same period last year. Exports to Norway,

the only significant non-EU European market for American hardwood lumber other than the UK, were also down 33% to 2,700m³.

The main winners in terms of hardwood species in the EU market so far this year have been red oak to Italy (+64% to 8,700m³), white oak to Portugal (+64% to 5,300m³), and ash to Estonia (+122% to 2,400m³). The principal loser has been tulipwood to Italy (-43% to 4,400m³) and Germany (-32% to 3,400m³).

Uncertain geopolitics and tariffs cloud market forecasts

Looking at market prospects, the likelihood is that underlying consumption of hardwood in both the UK and the EU will remain subdued for the rest of this year and slightly improve in the medium term. Some positive factors that might support a recovery include a slight improvement in macroeconomic indicators, an expected easing of inflation and interest rates, and potential wage growth. These factors could boost consumer confidence and encourage spending on wood furniture and joinery products. But any forecast this year must be subject to a higher-than-usual degree of uncertainty as the overall economic and geopolitical environment remains volatile, with significant downside risks.



EU talks in search of an agreement around tariff and non-tariff barriers are still on-going while the 9 July deadline for completion of these talks is fast approaching.

The uncertainties for U.S. hardwood demand are particularly high in the EU. U.S.-EU talks in search of an agreement around tariff and non-tariff barriers are still ongoing, while the 9 July deadline for



completion of these talks is fast approaching. On 3 July the EC president, Ursula von der Leyen, told a press conference ahead of talks in Washington that “what we are aiming at is an agreement in principle,” adding that the 90 days allowed for talks made “an agreement in detail impossible”. According to the Financial Times, EU diplomats have said that they will likely accept the U.S. 10% across-the-board levy but the EU’s agreement may be dependent on their getting significant cuts to the higher sectoral tariffs on steel (currently 50%), and on vehicles (currently 25%).



AHEC is confident that with the AHA platform and the legal opinion paving the way for county geolocations, the EUDR at least will not present an obstacle for American hardwoods in the EU.

Much also hinges on the willingness of the EU to take steps to reduce a range of non-tariff barriers that are concern for the U.S.. AHEC understands that adjustments to the EUDR to avoid it becoming a technical barrier to trade for U.S. forest products—which are in any case negligible risk from an EUDR perspective—is part of that negotiation. Irrespective of the outcome of this negotiation, AHEC is confident that the combination of the new AHA platform and the legal opinion paving the way for delivery of county geolocations, will mean that EUDR at least will not present an obstacle for American hardwoods in the EU.

The U.S.-EU tariff negotiations are going to the wire, unsurprising given the complexities of a bilateral trade relationship valued at nearly \$2 billion annually. The parties may yet agree to extend talks beyond the 9 July deadline. But there is still a possibility

that no agreement will be reached, leading to the imposition of a U.S. tariff of 20% or more on most EU goods, potentially starting as early as 1 August, and the imposition of retaliatory tariffs on U.S. goods imported into the EU.

As things stand therefore, we can only repeat what was said in the May Market Report, that the working assumption must be that the EU’s additional 25% tariffs on imports of those U.S. hardwood products identified in the first retaliatory list will be applied from 14 July. Further, to point out that the EU regulation makes no allowances for products already on the water on that date. For clarity, the product codes relevant to U.S. hardwoods due to be subject to the EU 25% tariff from 14 July are accessible [here](#).

ACTIVITIES

No.1 Common makes major impact at 3daysofdesign

AHEC Europe’s *No.1 Common* was one of the most impactful showcases at 3daysofdesign 2025 in Copenhagen (18-20 June). Presented at the first Danish edition of Material Matters, the project put the spotlight firmly on the untapped potential of No.1 Common grade hardwoods, shifting the conversation from underused species to underused grades. The response from designers, media and manufacturers was immediate and enthusiastic.

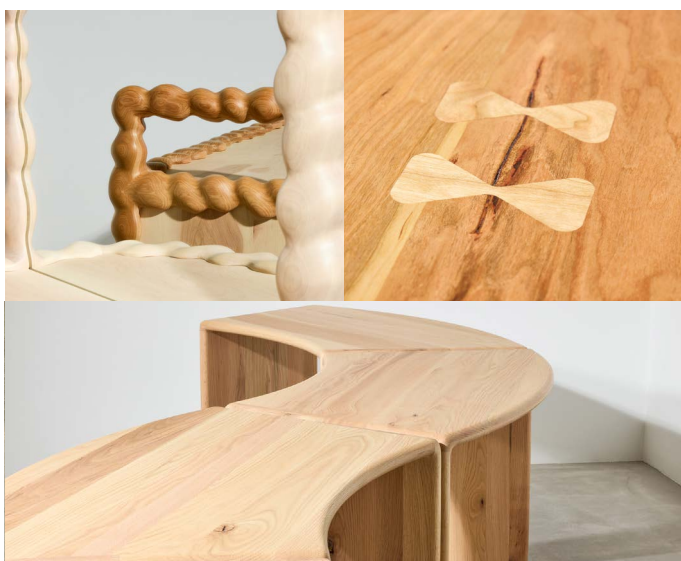


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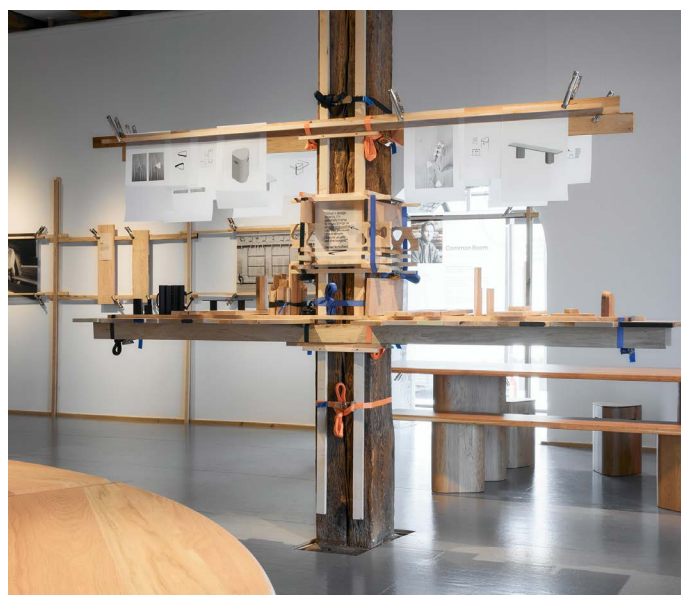
Over the three days of the fair, AHEC made the case for greater use of character-grade timber in European markets—a message that resonated across the design and manufacturing sectors. Conversations with leading producers, architects and designers, as well as journalists, revealed growing support for broadening the acceptance of lower grades in order to improve yield, reduce waste, and open new possibilities for American hardwoods.

The installation showcased new work by designers Andu Masebo, Daniel Schofield and Anna Maria Øfstedal Eng, each selected for their distinctive approaches to material and process. Masebo brings an experimental, socially driven mindset that blurs the line between object and experience; Schofield is known for his refined, functional forms that quietly elevate everyday materials; and Øfstedal Eng offers a sculptural, intuitive perspective rooted in craftsmanship and natural form. Working with No.1 Common red oak, cherry, brown maple and yellow birch, the designers embraced the grade's visual and structural challenges to highlight its expressive potential.



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Crafted in collaboration with Benchmark, the project was set within an exhibition designed by KUF Studios that itself demonstrated sustainability in action—built entirely from production offcuts and designed for full reuse. This near carbon-neutral approach to the exhibition space earned praise from peers and visitors alike, while the combined voices of the designers helped create a rich and layered narrative around U.S. hardwoods, quality and sustainability.



Built entirely from production offcuts and designed for full reuse, designed by KUF Studios, the exhibition demonstrated sustainability in action.

Throughout the event, AHEC and the designers hosted a series of public-facing initiatives to extend the project's message. These included a hands-on lamp-making workshop using offcuts from the pieces on display; a tour and discussion led by the designers and project partners; and a playful but purposeful distribution of U.S. hardwood samples in the form of small ice cream bowls, offered to selected press and visitors to take home—a tangible way to encourage ongoing engagement with the material.



AHEC and the designers hosted a series of public-facing initiatives to extend the project's message and provide a tangible way to engage with the material.



AHEC welcomed a group of 20 international journalists for a dedicated press preview and private dinner with the designers. The project has already received extensive media coverage, with Dezeen calling it “an important intervention in how we value and work with timber” while Wallpaper* noted its “refreshingly direct message about responsible material use”.

With more coverage expected in the coming months, *No.1 Common* has established itself as a milestone project in AHEC’s communications work. It has helped open new doors for material acceptance, industry conversation and future market development for American hardwoods in Europe.



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***No.1 Common* in the spotlight: media reach and recognition**

With over 60K registered visitors this year (not including unregistered public visitors), 3daysofdesign upholds its reputation as one of the leading global design festivals, with a diverse and influential audience spanning designers, architects, and industry leaders.

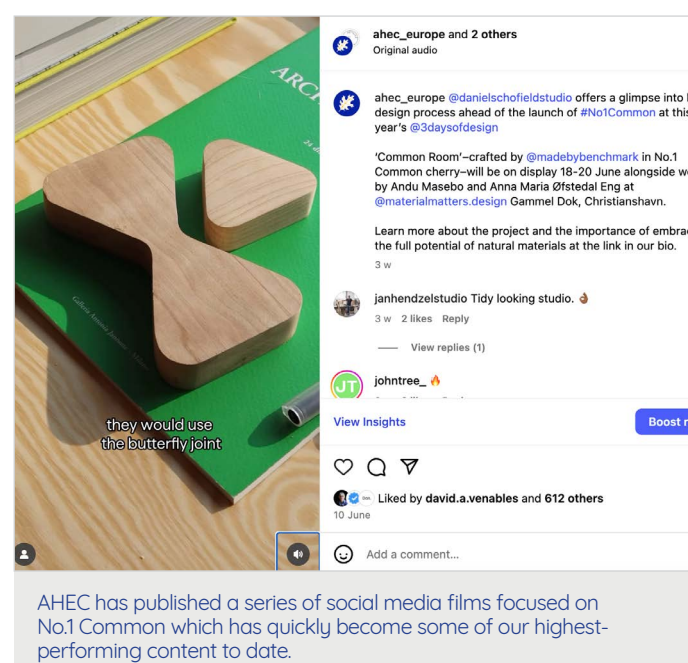
Featured in several major festival highlight roundups—including those by Dezeen, Curated Maps, and Wallpaper* — *No.1 Common* firmly established itself as an unmissable exhibition. The press spotlight has continued well beyond the festival, with top-tier publications like Dezeen and Stir publishing dedicated features on the exhibition which clearly

convey its compelling material narrative. Moreover, the exhibition sparked an extraordinary response across social media, as visitors shared content that engaged not just with the pieces, but the exhibition’s overarching material story too.

To date, *No.1 Common* has generated 55 online clippings, reaching a potential audience of 3 million. See [here](#) for a summary of some of the top press and social media coverage.

Telling the story of *No.1 Common* through social media

AHEC has published a series of social media films focused on *No.1 Common*—including designer process reels, an exhibition walkthrough, and interviews with visitors—which offer valuable insights into the project’s development, while educating viewers about the material. It has quickly become some of our highest-performing content to date, with video posts on Instagram alone generating 72K views and reaching 18.7K accounts.



The project’s designers, who have a combined following of 31.3K, were also highly active in sharing the project on Instagram. Through individual posts and collaborative content with AHEC, they helped significantly boost both the project’s reach and our overall presence on the platform.

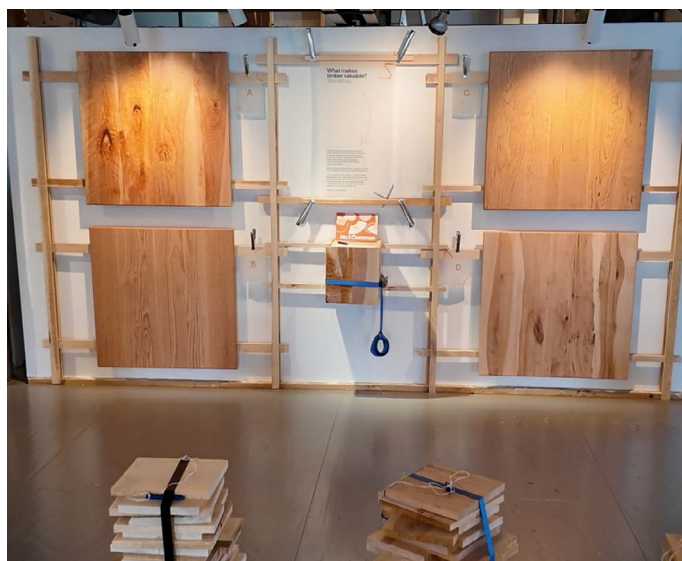
Looking ahead, a final project film will launch in July, capturing the full *No.1 Common* journey—from



the initial material workshop to the final exhibition. A shortened reel will be shared on our Instagram, with a link to the full-length film on YouTube. A separate material research film is available to view now on YouTube, accessible [here](#), which documents Benchmark's preliminary experimentation working with the No.1 Common grade.

Researching the acceptability of No.1 Common

Four edge glued panels, produced at Benchmark during the material research phase of the project, were showcased as part of the *No.1 Common* exhibition. Two of the panels were created from boards carefully selected to produce the 'cleanest' possible finish—free of characteristics like knots and splits and with a uniform grain pattern. The other panels were picked at random from the No.1 Common material, therefore containing large and small knots, dramatic colour variations and grain patterns. Exhibition visitors were invited to fill out a questionnaire indicating which panel they would most like to live with; which was the most natural and most sustainable; and which one spoke to them of quality.



Visitors were invited to fill out a questionnaire indicating which panel they would most like to live with; the most natural and most sustainable; and which one spoke to them of quality.

There were over 115 responses from architects, designers and members of the public. Initial analysis shows that 65% chose the lively panels of unselected maple and yellow birch with lots of knots as those they'd like to live with. Over 80% chose these same panels as the ones that felt the most natural and sustainable to them. 21% chose the cherry panel—selected for appearance and featured no knots but

included contrasting sapwood, gum streaks, and a lively grain pattern—as the panel they'd prefer to live with. For the same question, only 14% chose the red oak panel which was clear of defects and straight grained.



The findings showed that designers and consumers are much more receptive to characterful American hardwoods; in contrast to the current perception of most hardwood product manufacturers.

These are very interesting findings as they show that designers and consumers are much more receptive to characterful American hardwoods than what is the current perception of most hardwood product manufacturers. It also demonstrates that people do like the smoother grained hardwoods such as maple, cherry and birch—they are just not currently being shown them by product brands and retailers. In an interesting twist, when asked which panel they thought was the highest quality, nearly 40% chose the clean red oak panel, even though it was the one they'd least rather live with!

The AHEC Europe team will be continuing this research into perceptions around appearance of different species as part of a new strategy to persuade European markets to accept a wider range of species, and to encourage manufacturers to make fuller use of the material they buy—including utilising lower grades.

With thanks to *Bingaman & Son Lumber*, *MacDonald & Owen*, *Northland Forest Products* and *Duffield Timber* for their timber donation used in the *No.1 Common* project and exhibition.



No.1 Common Press Highlights



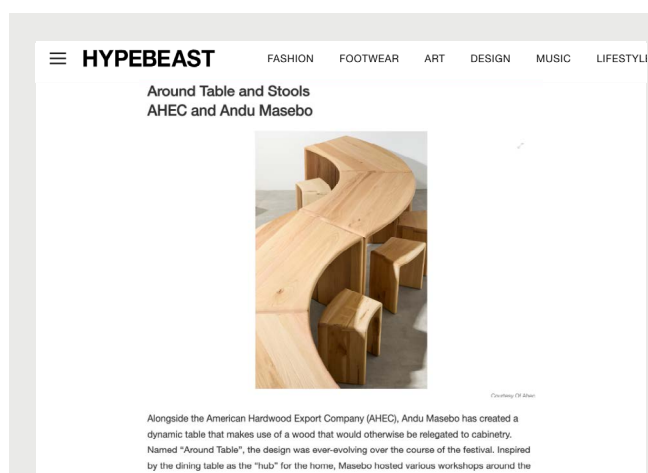
BO BEDRE, THE PAPER (DENMARK)

'In Praise of Imperfection: A conversation with Kia Utzon-Frank

No.1 Common, a group exhibition that explores regenerative forest practices and creative reuse through the less used American-hardwoods.'

Access the publication (page 42-43) online [here](#)

17K CIRCULATION



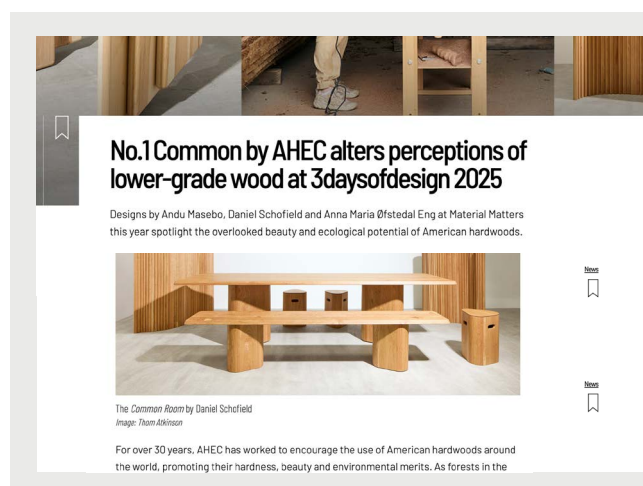
HYPEBEAST (UK)

'The Hypeform Edit: 10 Things We Loved From 3DaysOfDesign'

Alongside the American Hardwood Export Company (AHEC), Andu Masebo has created a dynamic table [...] Inspired by the dining table as the "hub" for the home, Masebo hosted various workshops around the furniture in a bid to create a sense of community.'

Read full article [here](#)

26.5 MILLION MONTHLY UNIQUE USERS



STIR PAD (UK)

'No.1 Common by AHEC alters perceptions of lower-grade wood at 3daysofdesign 2025

In an era where sustainability and environmental sensitivity are increasingly the focal point for design practices, No.1 Common, an exhibition realised by AHEC puts forth a simple yet poignant enquiry: what if wood's beauty is not perfection, but character?'

Read the full article [here](#)

3.2 MILLION MONTHLY UNIQUE USERS





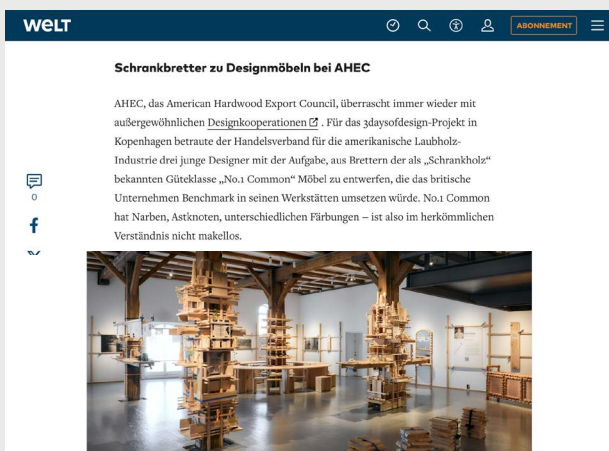
AREA (ITALY)

'AHEC presents an exhibition celebrating the natural diversity of wood

"No.1 Common" is rarely used, as it favours lighter, more uniform woods. The AHEC exhibition aims to challenge this paradigm, celebrating a sustainable approach to material selection'

Read the full article [here](#)

24.9K MONTHLY UNIQUE USERS



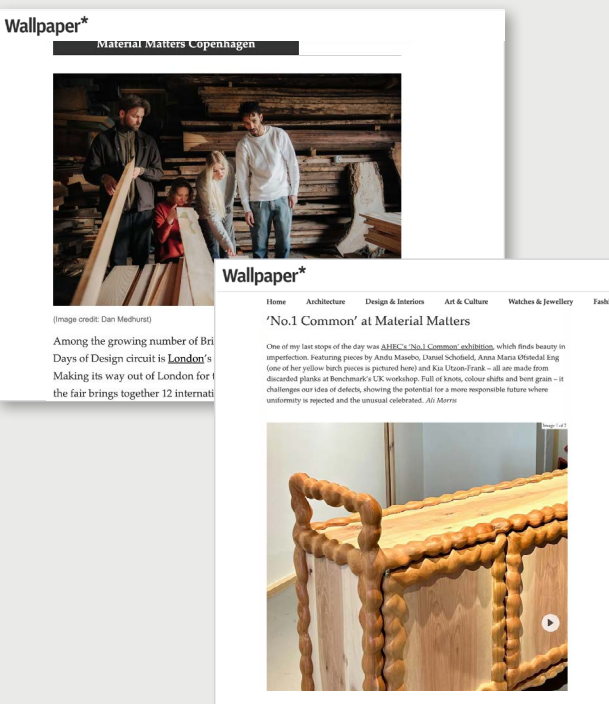
WELT (GERMANY)

'Cabinet boards for designer furniture at AHEC

For the 3daysofdesign project in Copenhagen, AHEC entrusted three young designers with the task of creating furniture from boards of the "No.1 Common" grade, known as "cabinet wood," [...] No.1 Common has scars, knots, and varying colors—thus, it is not flawless in the conventional sense.'

Read the full article [here](#)

250K MONTHLY UNIQUE USERS



WALLPAPER* (UK)

'Eleven great things to see at 3 Days of Design 2025

We're especially intrigued by 'No.1 Common', an exhibition from AHEC Europe, in which designers collaborate with British manufacturer Benchmark to create pieces that champion the natural beauty of wood – flaws and all.'

Read the full article [here](#)

'Live updates from the Wallpaper* team

Full of knots, colour shifts and bent grain – it challenges our idea of defects, showing the potential for a more responsible future where uniformity is rejected and the unusual celebrated.'

Read the full article [here](#)

1.7 MILLION MONTHLY UNIQUE USERS





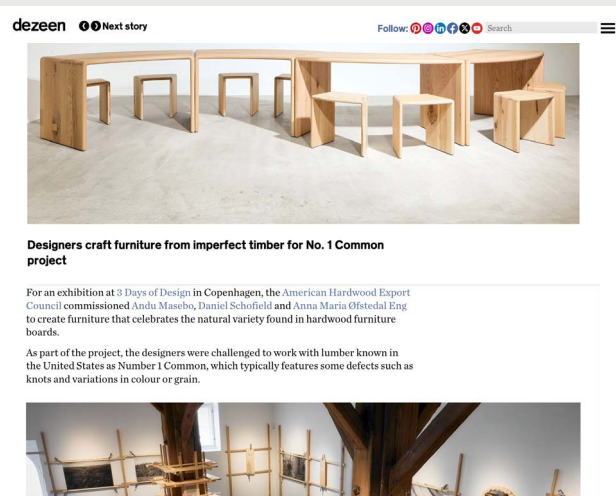
ARQUITECTURA Y DISEÑO (SPAIN)

'These pieces of furniture prove that there are no second-class woods.

The exhibition seeks to demonstrate the shared power and responsibility that designers, industry leaders, and consumers have in prioritizing environmentally conscious choices, rather than simply following trends that don't always respect the rhythms and needs of nature.'

Read the full article [here](#)

825K MONTHLY UNIQUE USERS



DEZEEN (UK)

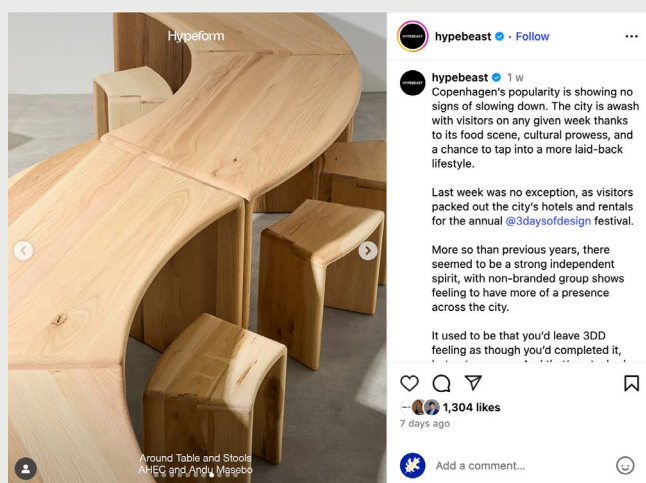
'Designers craft furniture from imperfect timber for No. 1 Common project

With the No. 1 Common project, AHEC aimed to make the case for overlooked hardwoods and promote a sustainable approach to material selection that encourages the use of the entire tree.'

Read full article [here](#)

3.1 MILLION MONTHLY UNIQUE USERS

Social media highlights



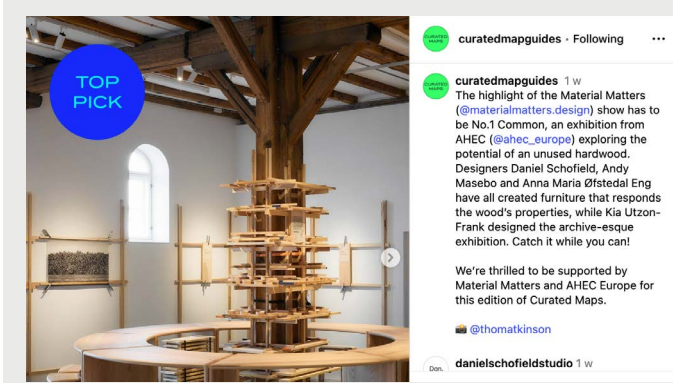
@HYPEBEAST

'The HypeForm Edit: 10 Things We Loved From 3daysofdesign [...] it left us wanting more. More so than previous years, there seemed to be a strong independent spirit, with non-branded group shows feeling to have more of a presence across the city.'

View full post [here](#)

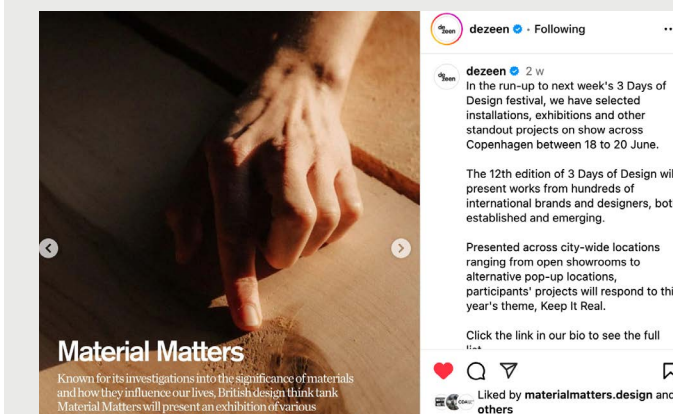
10.6M FOLLOWERS



**@CURATEDMAPGUIDES**

'The highlight of the Material Matters show has to be No.1 Common, exploring the potential of an unused hardwood.'

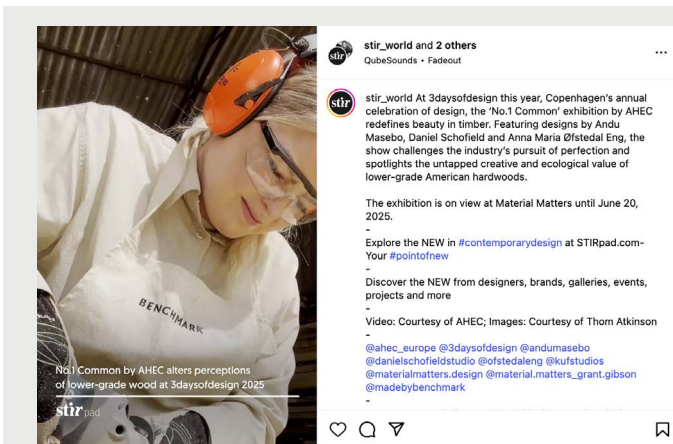
View full post [here](#)

1.4K FOLLOWERS**@DEZEEN**

'Six things you dont want to miss at 3daysofdesign 2025

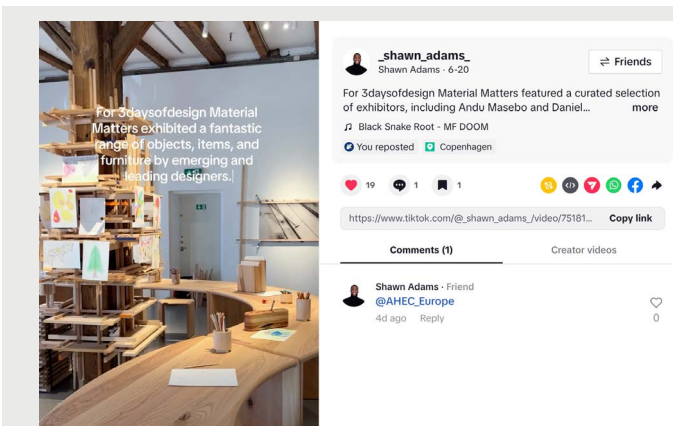
Known for its investigations into the significance of materials and how their influence our lives, British design think tank Material Matters will present an exhibition of various participants.'

View full post [here](#)

3.5M FOLLOWERS**@STIR_WORLD**

'The 'No.1 Common' exhibition by AHEC redefines beauty in timber: the show challenges the industry's pursuit of perfection and spotlights the untapped creative and ecological value of lower-grade American hardwoods.'

View full post [here](#)

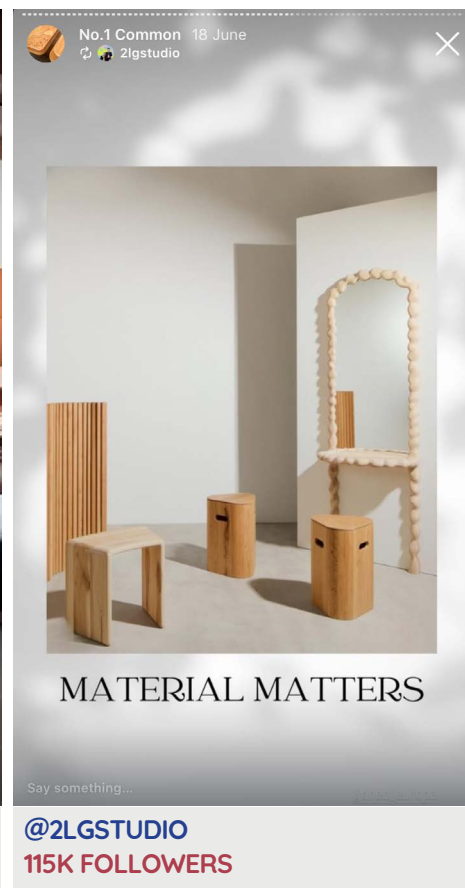
103K FOLLOWERS**@_SHAWN_ADAMS_**

'My highlight has to be the AHEC exhibition 'No.1 Common which featured as part of the Material Matters showcase.

The project championed a sustainable approach to material selection, encapsulated by the ethos "use what nature provides."

View full post [here](#)

18.3K FOLLOWERS



EXCHANGE RATES

	31/03/25	30/04/25	31/05/25	30/06/25
1 EURO = \$	1.08	1.14	1.13	1.17
\$1 = EURO	0.92	0.88	0.88	0.85
£1 Sterling = \$	1.29	1.34	1.34	1.37
\$1 = Danish DKK	6.89	6.55	6.57	6.36
\$1 = Swedish SEK	10.01	9.62	9.58	9.48
\$1 = Czech CZK	23.02	21.88	21.96	21.10
\$1 = Hungarian HUF	370.93	354.63	355.7	340.15
\$1 = Polish Zloty	3.86	3.75	3.74	3.62
\$1 = Russian Rouble	84.80	82.10	77.82	78.44
\$1 = Turkish Lira	37.97	38.44	39.22	39.87

