

# American Hardwood Export Council Europe Market Report

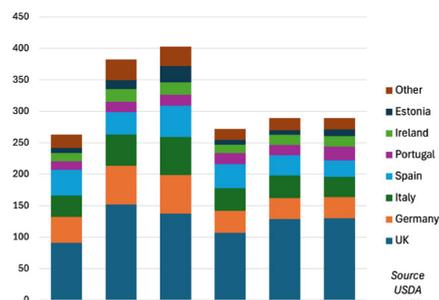
February 2026



A brand new series of our award-winning podcast *Words on Wood* is in the works and will be released shortly. Listen back to the first ever episode, *Welcome to the forest*, [here](#).

## MARKET UPDATE

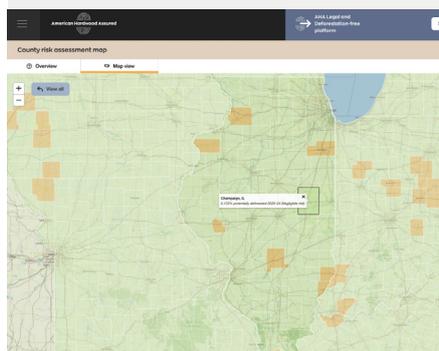
U.S. hardwood lumber exports to Europe by country:  
2020 to 2025, 1000 m3



**U.S. HARDWOOD LUMBER EXPORTS TO EUROPE IN 2025 STABLE DESPITE UNCERTAIN MARKET CONDITIONS**

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## ACTIVITIES



**CONCERTED EFFORTS TO ENSURE AHA ACCEPTANCE UNDER EUDR**

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## NEWS



**PROPOSED NEW EU PHYTOSANITARY CONTROLS ON OAK**

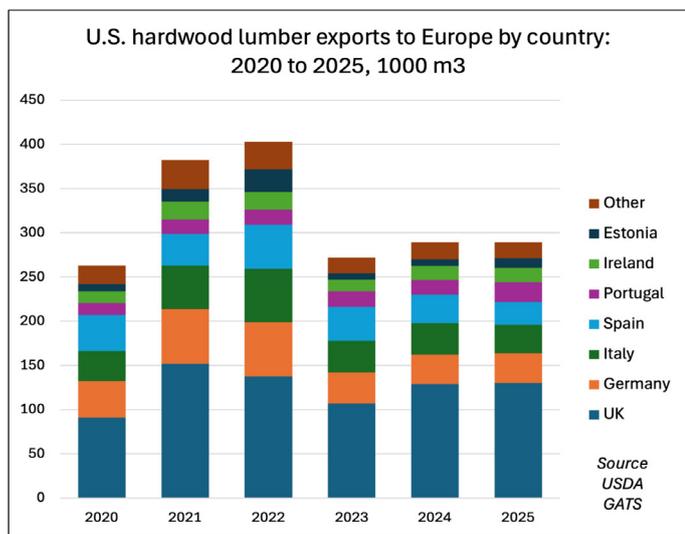
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# MARKET UPDATE

## U.S. hardwood lumber exports to Europe in 2025 stable despite uncertain market conditions

Despite the political tension last year, the impact on trade due to tariff threats and the slow pace of economic growth in the region, U.S. hardwood exports to Europe in 2025 held up remarkably well overall. It was a mixed picture with some markets continuing to see declines while others performed better than expected.

Total U.S. hardwood shipments of sawn lumber to Europe (EU 27 + UK) in 2025 were virtually unchanged from the previous year at 320,827m<sup>3</sup> with a 2% increase in value to \$226.5 million. Exports to the **UK** increased slightly to 130,029m<sup>3</sup> accounting for 40% of the total, only a bit below 2022 levels. Whereas the leading EU markets of **Germany, Italy and Spain** have seen shipments nearly halved in volume since then. In 2025, exports to Germany were unchanged from 2024 at 33,796m<sup>3</sup>, whereas Italy and Spain both experienced further falls in exports to 31,947m<sup>3</sup> (-12%) and 26,227m<sup>3</sup> (-18%) respectively.

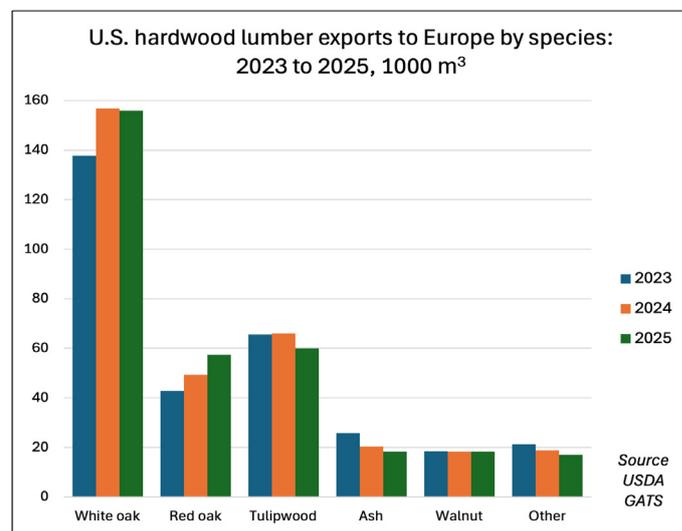


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**Portugal**, on the other hand, is now the U.S. hardwood industry's fourth largest EU export market, after Germany, Italy, and Spain, and has been growing rapidly in recent years to a total value of nearly \$40m last year, comprising 22,000 cubic meters of lumber, 7.2 million m<sup>2</sup> of veneer, and 10,450 m<sup>3</sup> of logs. The U.S. supplies a wide range of

high value hardwood species to Portugal for which there are no ready substitutes, notably red oak, white oak, walnut, and tulipwood. These species are important raw materials for Portugal's joinery and furniture manufacturing sector, both for domestic consumption and for re-export to the wider European market. In 2024, Portugal exported approximately \$147m in wood carpentry/joinery, ranking as the 29th largest exporter globally. The sector is driven by high-quality, specialised products, with primary export destinations including Spain (\$43.7M), the UK (\$26.4M), and France (\$14M). The industry is known for blending traditional craftsmanship with innovative, sustainable design, often using U.S. hardwood in lumber or veneer form.

Other markets that saw positive gain last year include **Ireland** whose exports were up 4% to 16,582m<sup>3</sup>, half of which is white oak which was unchanged from 2024. Red oak increased 43% to 3,000m<sup>3</sup> and tulipwood was up 10% to 3,300m<sup>3</sup>. Exports to **Estonia** increased 43% to 10,791m<sup>3</sup> compared to the year before, the majority of which is two species: ash 5,368m<sup>3</sup> (+20%) and red oak 3,566m<sup>3</sup> (+148%). Estonia has become an important hub for the supply of thermally modified hardwood (TMT) and mouldings and millwork to other EU markets. **Greece** also saw shipments increase to 7,800m<sup>3</sup> (+22%) the majority of which is red and white oak.



Red oak exports accounted for nearly 18% of total U.S. hardwood exports to Europe in 2025.

## Red oak lumber continues to increase its share of U.S. hardwood exports to Europe

2025 was another good year for red oak shipments



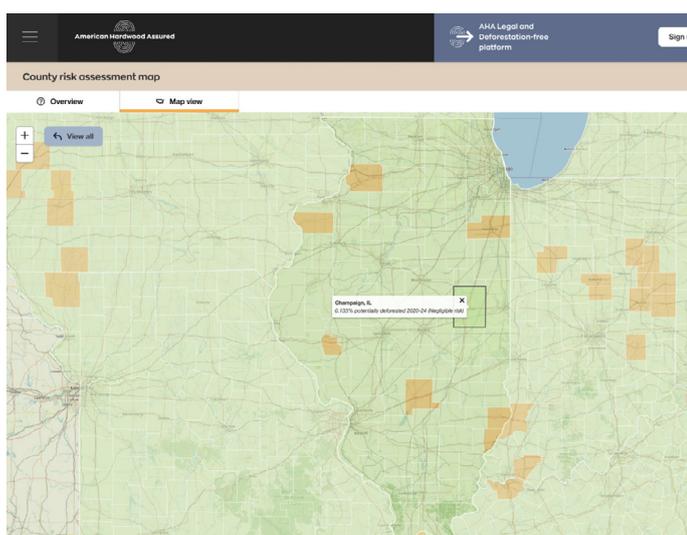
to Europe with an increase in volume of 18% to 56,247m<sup>3</sup> compared to the previous year and now accounting for nearly 18% of total U.S. hardwood exports to Europe. One of the main destinations is Italy, where red oak accounted for almost half of the lumber shipments in 2025 at 15,179m<sup>3</sup>. Red oak exports increased to the UK at 6,571m<sup>3</sup> (+10%), Spain 6,571m<sup>3</sup> (+10%) and Ireland 2,983m<sup>3</sup> (+43%). White oak easily dominates shipments to Europe and exports in 2025 were unchanged at 151,000 m<sup>3</sup>, half of which went to the UK.

## ACTIVITIES

### Concerted efforts to ensure AHA acceptance under EUDR

AHEC is confident that the threat posed to U.S. hardwood market access in Europe by EUDR has been largely neutralised, indeed turned into an opportunity, following the launch of the [American Hardwood Assured \(AHA\) Platform](#) in August last year. This will deliver all the due diligence data, including geolocations, demanded under the terms of EUDR.

Nevertheless, to enhance legal clarity, AHEC wants to encourage the European Commission (EC) to make a single change to the legal text leaving no doubt that county-level geolocations can be accepted by EU regulators. Under the EUDR Amendment Regulation, passed in December 2025 announcing the 12-month delay to enforcement, the EC was also mandated to



[AHA Platform](#) launch presents an opportunity for U.S. hardwood market access in the face of the EUDR.

review the legislation with a view to proposing further changes to the legal text before 30 April 2026.

The one change we are advocating is to remove the phrase “within a single real estate property” from the definition of the “plot of land” for which geolocation data is required. This would allow the geolocation plot to be defined more realistically as a local jurisdiction such as a county, or as a mill supply area or similar unit. The legal case for this change is both simple and incontrovertible. The reference to a “single real estate property” in the legal text can have no legal force because it does not apply to at least 73% of global forest area. In three billion hectares of the world’s total four billion hectares of forest, it is already perfectly acceptable under strict interpretation of the EUDR legal text to define the plot of land solely based on it being “homogeneous risk”. All AHEC is asking is for that same flexibility to be adopted in those countries and regions where land is predominantly privately owned and therefore legitimate “real estate property” – areas which are incidentally much more dominant in low-risk forest regions in North America and Europe than in tropical or boreal forest.



Despite earlier indications that the EUDR legal text might be adjusted to accommodate U.S. exporters, the EC is now signalling that it does not intend to propose any changes.

Regrettably, the EC has so far chosen not to respond to any of our requests for a meeting to present our case, despite several approaches both directly and through intermediaries at European trade associations. This is perhaps understandable given on-going political tension between the U.S. and EU. The EC is also sending [discouraging signals](#) that they do not intend to propose any changes to the legal



text, other than to extend the product scope. Just at this critical moment, we've lost the leverage that might be exerted through the EU's commitment in last year's framework trade agreement to *"work to address the concerns of US producers and exporters regarding the EUDR, with a view to avoiding undue impact on US-EU trade"*.

But we haven't let that deter us from pushing for a legal amendment that will both strengthen EUDR and provide a firmer foundation for continuing good trade relations in the forest products sector between the U.S. and EU. Faced with existing obstacles to direct engagement with the EC, we are adjusting our approach. We are working closely with the European trade associations now leading efforts to encourage sensible reform of the EUDR – including CEI Bois (EU wood product manufacturers association), GD Holz (German timber industry federation), and the European Timber Trade Federation. All these organisations have agreed to include AHEC's proposal to amend the plot of land definition as part of their own submissions to the EC. We've been sharing our ideas with EU forest owners' associations that seem sympathetic as their members are equally concerned about the extra red tape and issues around private property rights and confidentiality arising from mandatory reporting of property-level geolocation.

AHEC is now arranging a series of meetings with the EUDR Competent Authorities in key member states, prioritising those which are either larger importers of U.S. hardwoods (Germany, Italy, Spain, Portugal),

or particularly influential in setting regulatory benchmarks across the region (such as the Netherlands). Early indications from these meetings are that, while there are still some differences in legal interpretation around the delivery of due diligence data at a county instead of a property level by some EU regulators, there are reasons for optimism that AHA Statements will be uniformly accepted for EUDR conformance when enforcement starts at the end of this year. To ensure this, AHEC still has work to do to raise awareness amongst EU regulators and operators of the nature of U.S. hardwood supply chains and the quality of the evidence provided by AHA to confirm negligible deforestation and illegality risk – which is at least as good as, and likely surpasses, that of any other regulated commodity. This effort would benefit considerably through a demonstration of widespread uptake of the AHA platform by both U.S. hardwood exporters and their EU customers.

On the U.S. side, we have successfully advocated for our proposal for an amendment to the "plot of land definition" to be put before the EC, not only by AHEC, but also by the wider U.S. forest products sector – with organisations including the American Forest and Paper Association (AF&PA), the U.S. Industrial Pellet Association, the National Association of Forest Owners (NAFO), and the U.S. Association of Consulting Foresters, all agreeing it should be the priority target for reform at this time. These organisations are now very actively communicating the benefits of this approach through their own industry networks. NAFO have been particularly successful in encouraging EU engagement by arranging meetings between representatives of U.S. tribes and EC officials. At these meetings, tribal leaders have raised concerns about the lack of consultation on a law that has very direct implications for their sovereign right to decide how to use their own lands.

### **After a delayed start AHEC's plans for Europe for 2026 are rapidly taking shape**

In February the new Foreign Agricultural Service funding allocation was officially released to enable AHEC offices to confirm events and plan new activities. For Europe there is an exciting and active program developing. In March AHEC will participate in the Greek wood trade show Medwood in Athens. AHEC will also be attending the annual conference of the Spanish Timber trade federation (AEIM)



Despite discouraging signals from the EC, AHA's credibility is strengthening through endorsements from a number of European trade associations and organisations across the U.S. forest products sector.



including a presentation on the AHA initiative. Two new design projects are being initiated. One for Clerkenwell Design Week in London in May, which will be a national student design competition focused on cherry. The other is an ambitious creative exhibition planned for 3daysofdesign in Copenhagen in June aimed at changing attitudes towards using more of the U.S. hardwood resource and its species as a sustainable solution. AHEC will also be exhibiting with an AHEC/AHA information stand at Carrefour du Bois in the French city of Nantes in the first week of June and then at Maderalia in Valencia, Spain in November. Finally, later in the year there are plans to host additional screenings of the *Forested Future* documentary before releasing it online, and listeners of our award-winning podcast *Words on Wood* can also look forward to a brand-new series.

## NEWS

### Proposed new EU phytosanitary controls on oak

AHEC became aware of another potentially significant regulatory threat to U.S. hardwood market access in the EU in the first week of February when we learned of an EU draft legislative proposal to alter the phytosanitary requirements for all shipments of oak lumber, railway ties, mouldings, logs, and staves (but excluding veneers). This was initially threatened to be imposed from as early as “March/April” this year. It came in the form of a draft EU legislative amendment notified to the WTO in early December, but seemingly not communicated via any other channel. The amendment aims to extend EU plant health controls to mitigate the risk of infestation by the two-lined chestnut borer (*Agrilus bilineatus*), a pest endemic to the Eastern U.S. and for which both sweet chestnut and oak may act as hosts.

While there is no question of the legitimacy of the EU’s efforts to control this bug, there are questions to be answered around the decision-making process, the timing and extent of consultation on the amendment legislation, and on the range of allowable phytosanitary treatments proposed by the EC. These are significantly more restrictive than those recommended by the European Plant Protection Organisation (EPPO), the scientific body established to assess plant health risks and recommend mitigation measures in Europe.

For reasons that are still unclear, the EC has yet to

respond to direct requests for clarification from both APHIS and AHEC. The draft legislation omits the only treatment option that is both recognised as effective by the EPPO and practically implementable in the U.S. hardwood sector. That treatment involves “debarking followed by heat treatment (minimum temperature of 56°C for a minimum duration of 30 continuous minutes throughout the entire profile of the wood including its core)”. Which of course is easily satisfied by the commercial kiln drying process.



Proposed EU phytosanitary controls on oak omits the only treatment option that is both recognised as effective by the EPPO and practically implementable in the U.S. hardwood sector.

In the absence of that treatment being listed, the legislation would impose a mandatory requirement for all listed oak products placed on the EU market to either “have bark and at least 2.5 cm of the outer sapwood removed” or to be “subject to ionising radiation”. Neither option is workable in the U.S. oak context. The removal of 2.5 cm of outer sapwood lies outside the scope of well-established industry practices and the NHLA grading rules and is, in any case, impossible to enforce. The high costs and lack of available facilities for ionising radiation make that option impossible as well.

The option of debarking combined with HT is the only one that may be applied at commercial scale in the U.S. hardwood export industry. The required controls may be integrated into existing kiln drying verification programs operated by APHIS and/or NHLA to deliver KD-HT marked packs of lumber. But even then, some additional time will be required to communicate the changes and make the necessary adjustments to existing procedures.



On the other hand, if this option is excluded from the amendment legislation, that would effectively create an insurmountable barrier to continuing EU trade in American oak.

Subsequent investigations by AHEC have revealed that the EC held no consultations with APHIS on the proposed new controls on oak. Nor is there any evidence, judging from public agendas and meeting notes, that these new controls were ever even discussed by the responsible EU Standing Committee. This contrasts with previous discussions around the EAB (*Agrilus planipennis*) controls on ash which were always flagged well in advance and very thorough.

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Such are the circumstances surrounding the EC's preparation and communication of the legislative amendment, and the profound consequences that would arise, that we are left wondering if there was in fact a simple error made by the EC during its preparation. Perhaps the EC only inadvertently omitted the de-barking-HT option from the draft legislation?

Both AHEC and APHIS have requested clarification from the EC on this point and on their intentions in relation to the draft law. On 13 February, APHIS made a formal request for a meeting with the responsible EC officials with the following points submitted for discussion:

- Is the draft legislation presented in the manner intended, providing just one treatment option which has historically posed challenges and difficult to meet?
- A general timeframe of when the amendment legislation is expected to be published.
- When enforcement is expected to begin; immediately upon publication or will there be a delay to clear cargo that already shipped?
- What effect, if any, will this regulation have on coopered materials?
- How will this affect the recent derogation for oak logs for veneer systems approach?

On 19 February, the EC acknowledged receipt of APHIS meeting request and stated that they would reply "very soon" with what they "believe will give the necessary clarifications". We now expect to receive that clarification during the week beginning 9 March following a Plant Health Standing Committee meeting scheduled for 6 March, for which the possible new phyto controls on oak from the U.S. have been introduced as a specific agenda item following the interventions by AHEC and APHIS. As soon as we receive clarity on the outcome of this meeting in relation to U.S. hardwood trade in oak, we will issue an alert to members.

# EXCHANGE RATES

	30/11/25	18/12/25	31/01/26	28/02/26
1 EURO = \$	1.16	1.17	1.19	1.18
\$1 = EURO	0.86	0.85	0.84	0.84
£1 Sterling = \$	1.32	1.33	1.37	1.34
\$1 = Danish DKK	6.44	6.36	6.27	6.32
\$1 = Swedish SEK	9.44	9.31	8.85	9.03
\$1 = Czech CZK	20.77	20.74	20.43	20.52
\$1 = Hungarian HUF	328.71	339.96	320.01	318.44
\$1 = Polish Zloty	3.65	3.59	3.53	3.57
\$1 = Russian Rouble	77.48	80.01	75.58	77.09
\$1 = Turkish Lira	42.48	42.71	43.47	43.93

