



# MARKET REPORT

SOUTHEAST ASIA & GREATER CHINA | April 2026

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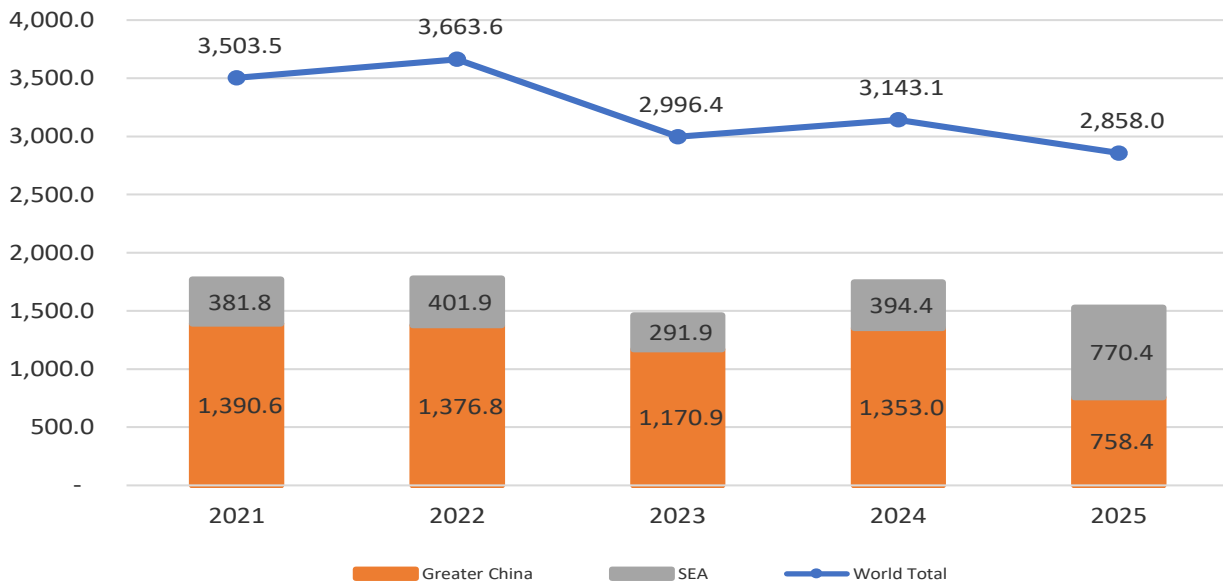
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## Southeast Asia Overtakes Greater China as the Largest Market for U.S. Hardwoods in 2025

U.S. hardwood exports in 2025 continue to realign, with a significant shift toward Vietnam and the broader Southeast Asia region, helping to offset the impact of China’s logs ban in early of 2025. U.S. hardwood log exports to China fell sharply – down 77% (YoY) to \$146 million, while Southeast Asia, particularly Vietnam, absorbed most of the banned log volume. As a result, log exports to Vietnam surged 359% to \$472.2 million when compared to 2024.

The total value of U.S. hardwood products (lumber, logs, and veneer) shipped to Greater China and Southeast Asia in 2025 fell 12.5% (YoY) to over \$1.52 billion. The Greater China market dropped nearly 44% to \$758 million, while in contrast, the Southeast Asia market rose more than 95% (YoY) to \$770 million. Southeast Asia region has become the largest importer of U.S. hardwood globally, with Greater China now ranking second.

**US Hardwood (lumber+logs+veneer) Exports Value (USD million)**

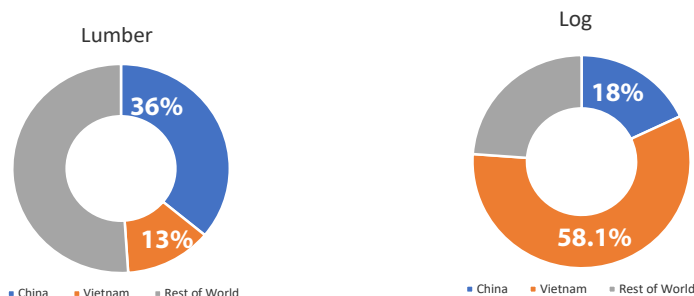


	Hardwood Lumber	% change	Hardwood Log	% change	Hardwood Veneer	% change
<b>Greater China</b>	\$603 million	14.9%	\$152.5 million	76.2%	\$2.1 million	5.6%
<b>Vietnam</b>	\$214.6 million	--	\$472.2 million	359%	\$7.2 million	11%
<b>Indonesia</b>	\$24.1 million	20%	\$1 million	128%	\$10.4 million	10%
<b>Thailand</b>	\$13 million	20%	\$0.736million	29%	\$2 million	280%
<b>Malaysia</b>	\$14.9 million	14%	\$0.059 million	175%	\$4.8 million	42%
<b>Philippines</b>	\$1.2 million	22%	-	-	\$1.7 million	59%
<b>Singapore</b>	\$0.553 million	57%	\$0.297 million	-	\$0.079 million	4%

Year-on-Year changes in U.S. exports of hardwood lumber, logs and veneer to Greater China and SEA, 2025 (Source: USDA)

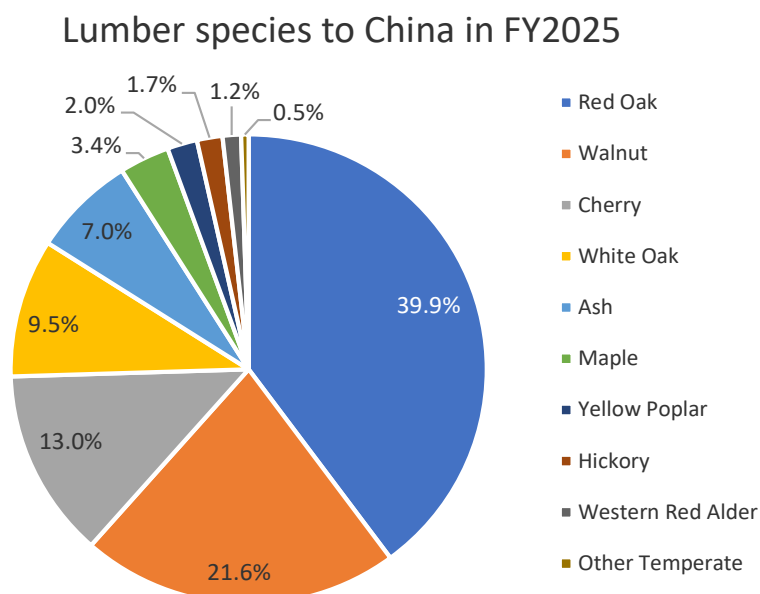
## Greater China market – plunged over 40% (YoY)

2025 marked a tipping point for GRCH market. Total U.S. hardwood export value fell to nearly \$760 million, a decline of more than 40% (YoY), both lumber value and volume decreased over 14% and 19% (YoY) respectively to \$603 million and 804,382 M3. Logs exports value hit even harder: value slumped 76% to \$152 million and volume dropped 77% (YoY) to 231,337 M3; veneer increased slightly at 5.6% to \$2.1 million.



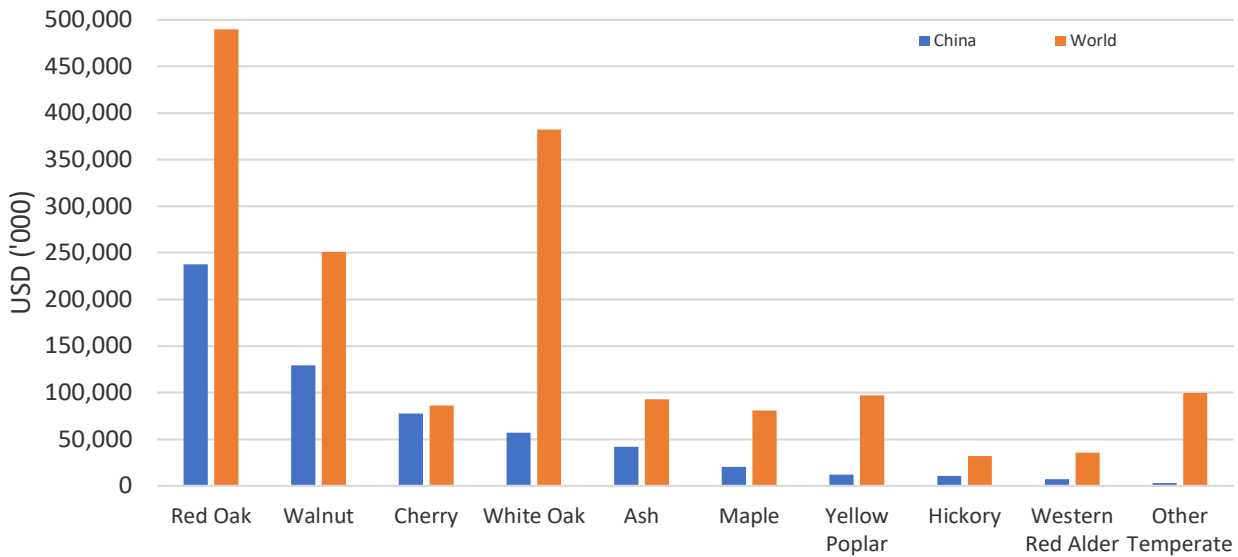
Lumber Species	Export Value (US\$)	YoY % change	Export Qty (M3)	YoY % change
Red Oak	\$237.7 million	9%	359,610	11%
Walnut	\$129.1 million	11%	88,770	22%
Cherry	\$77.5 million	18%	99,630	20%
White Oak	\$56.8 million	8%	77,918	11%
Ash	\$41.8 million	35%	64,694	32%
Maple	\$20.3 million	10%	25,928	18%
Yellow Poplar	\$12.1 million	43%	32,102	46%
Hickory	\$10.3 million	5%	16,450	24%
Red Alder	\$7.3 million	36%	23,388	34%

US Hardwood Lumber Exports to Mainland China by Species in FY2025 (Source: USDA)



The U.S. hardwood exports to China in the first half of 2025 were largely driven by red oak, walnut, cherry, ash, white oak, and maple, which together accounted for over \$563.5 million in export value—representing more than 94% of all hardwood lumber shipments to the region. China purchased nearly 90% of all cherry, 48.5% of all red oak, over 51% of all walnut, 45% of all ash, and over 32% of all Hickory that was exported globally in 2025.

Top Species to Mainland China vs World Total in FY2025

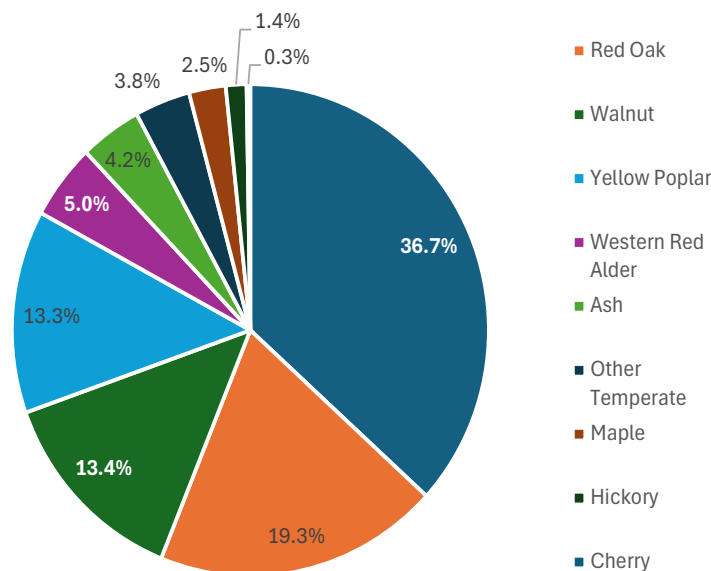


### Southeast Asia Market – surged over 95% (YoY)

2025 was an exceptional year for the region of Southeast Asia. Overall U.S. hardwood exports to jumped over 95% (YoY), reaching more than \$770 million, making it the largest importers of U.S. hardwood globally. This rapid growth was driven by resilient tariff structures and the ongoing realignment of supply chains between GRCH and SEA.

Hardwood lumber exports to SEA remained relatively stable, edging up 0.7% YoY, totaling \$268.5 million. In contrast, the value of log exports saw explosive growth: value soared nearly 355% (YoY) to \$474.3 million, with volume tripling to 814,011 (M3). Veneer exports also saw a notable increase of 24.6% YoY, reaching \$26.3 million. Vietnam continues to be the primary driver of Southeast Asia’s expansion, with its purchases of U.S. hardwood logs increasing sharply.

Lumber species to SEA market in FY2025



#### SEA Markets

Vietnam

#### Top Lumber Species (US\$, YoY % change)

White Oak (\$83.1 million, 16%)  
 Red Oak (\$39.5 million, 16%)  
 Yellow Poplar (\$33.5 million, 24%)

#### Top Lumber Species (M3, YoY % change)

White Oak (119,318, 14%)  
 Red Oak (63,414, 10%)  
 Yellow Poplar (100,876, 24%)

SEA Markets	Top Lumber Species (US\$, YoY % change)	Top Lumber Species (M3, YoY % change)
Indonesia	White Oak (\$6 million, 40%) Red Oak (\$5.3 million, 20%) Walnut (\$3.7 million, 25%)	White Oak (7,949, 36%) Red Oak (7,949, 10%) Walnut (3,157, 17%)
Thailand	White Oak (\$3.9 million, 32%) Red Oak (\$3 million, 47%) Ash (\$2.7 million, 9%)	White Oak (5,964, 25%) Red Oak (4,178, 42%) Ash (3,936, 5%)
Malaysia	White Oak (\$4.8 million, 5%) Red Oak (\$3.6 million, 183%) Walnut (\$3.6 million, 7%)	White Oak (5,916, 3%) Red Oak (5,179, 147%) Walnut (3,038, 3%)
Philippines	White Oak (\$0.33 million, 10%) Red Oak (\$0.15 million, 71%) Maple (\$0.15 million, 54%)	White Oak (544, 23%) Red Oak (165, 41%) Maple (151, 32%)
Singapore	White Oak (\$0.35 million, 54%) Walnut (\$0.11 million, 1233%) Red Oak (\$0.054 million, 155%)	White Oak (568, 56%) Walnut (59, 2850%) Red Oak (59, 69%)

## Market Survey for SEA & GRCH conducted by John Chan

John Chan collected the market survey information through interview by telephone, whatsapp, wechat, physical and e-meeting etc. from the architects, interior designers, furniture designers and producers, lumber and veneer importers and distributors and associations leaders of SE Asia and GRCH and the information/remarks collected only represented their own opinions.  
China

1. China US hardwood importer/trader with offices in China and Vietnam put more focus in sawlogs and veneer logs trade in both China and Vietnam markets.

"Hi John, the demand is increasing. Especially for the hardwood logs, there were 50 saw mills and 8 veneer mills established in Ho Chi Minh. However, this is in Vietnam and not in China. New Order is too early but receive more enquiries. But now logs ban for import to China is lifted. And that positive for all concerned but perhaps except for those who rushed to take down their sawmill equipment to ship to Vietnam...that is not positive."

2. (Harry)- China American hardwood importer:

"Hi John, The demand for American lumbers in the Chinese market has not seen a significant increase, However, a large distributor having stockpiled too many American lumbers, are now selling them at very low prices, making other distributors even more reluctant to import at high prices.

As for American sawmills, it seems that their inventory is not large and their willingness to sell to China is very low. There are probably two reasons for this. One is that China has a 10% tariff, so the price accepted by Chinese customers will not be very high. The other is that Trump's changeable policies have also increased the sawmills' concerns about selling to China. They would rather sell to the United States, at least without the risk of receiving payment.

Now we want to buy some species of lumbers, but many sawmills in the United States don't have them in stock.

The recent snowstorm has also affected the production of many sawmills and will delay the delivery of orders by 3 to 4 weeks."

3. Global well-known Architects (Ohashi) International practices) in China:

"Hi John, of course everyone is affected in one way or another. I believe everyone is waiting or

watching the trade situation. At the same time, they need to keep going and find new alternatives. Most likely expanding business to other countries while developing their own internal economy further. Still opening up for foreign investments. Development of the tech industry will just continue on very quickly. The architecture and construction industry is more competitive, with local government projects that aim to activate and nurture these cities, while integrating green, sustainability, regeneration, reuse, reprogram of existing buildings and regional contexts."

4. Zhao, architect and CEO of media magazine and Design Association executive, IID -ASC

"Mr. Chan, the tariffs issue would cause the import of US hardwood in the near future not optimistic especially for those products produced in China for export to US market. However, it impacts slightly in the domestic consumption market especially for interior design projects. But in longer turn, it is hard to predict". Some traders could import from the third country as transit to get the better deals.

There is possibility that China could use AI technology as simulation to produce products with grain texture and color looks alike US hardwood. "But most interior designers and architects are still preferring using sustainable natural wood products."

5. Mr. Li, Wood trader and supplier,

"John Sir, thank you for passing this good news. In my personal opinion I think China and U.S. reached trade agreement would help to stabilize the market for short term but it is difficult to predict the stability in the future like next year but I think the market in short term the export value and volume in 2024 is difficult to resume."

6. Andrew, US hardwood supplier and trader

"I personally feel, the trade tariffs issue between China and U.S. has been temporarily cool down, but recovery is still slow. In short period (in the coming year it is on the wait and see situation, for one reason is the price has been rising to a high level and also the restructuring of the supply chains have been slow causing some customers to look for alternative. I feel in the medium and long term the demand of US hardwood market is expected to restructure from low end products to medium/high end as well the choice of special species such as walnut and red and white oak and cherry etc. I conclude that the window is reopened but some customers are temporarily gone. When will they come back will depend on the US and China trade policy - I believe future opportunity for US hardwood is bright and still exit."

7. Mr. Gao Hua architecture and interior design in Beijing

"Due to the U.S. hardwood possess distinctive characteristics such as variety species, special grain texture and being recognized as sustainable natural materials so I would like to build a wood structure building with US hardwood interior to show its practicality, beauty and artistry of the U.S. hardwood"

8. Qingdao Mr. Wang - Timber Distribution Yard -

Mr. Wang said, "even the U.S. and China two countries tariffs issue gradually became ease, but US hardwood would not immediately be expected to return to 2024 level mainly due to China's slow economic growth impacted deeply by the bursting of the real estate bubble reducing the consumer power."

9. Ms.Yi Han interior designer:

"During our design process I as Interior designer like to choose US hardwood including Maple veneer and Black walnut, Red oak,etc. most of them are our clients' favorite wood types, they are mainly used in interior design. I would say US hardwood species offer choice and stable supply and would be among interior designer's favourite choice."

10. Mr. Chang US hardwood supplier base in Taiwan said "U.S. hardwood is slightly weaker in 2025, "I think it is still considered stable. My opinion is that once the tariffs issue is settled, the foresee China market for U.S. hardwood is huge. Now the market situation has been slightly restructured: due to logs disallowed to imported into China during 2025, a number sawmills and veneer slicing mills were set up in Vietnam which produce lumber and veneer.

These facilities could have replaced a certain amount and quantities originally imported from USA. As the result, some U.S. hardwood sawmills and veneer slicing mills either reduced production or closed

down in the worse scenario. Under such circumstances, some end-users could not get supplies from the U.S. suppliers.

However I started receiving more enquires for lumber and logs. So I can feel and see the dim light of the future”.

Vietnam

SAWA (Structure Architecture Wood Association)

The VP of the association said that Vietnam is keen to develop the Cross Laminated Timber products for the fast American Hardwood Export Council Southeast Asia and Greater China He said the growing wood structure architecture project and need to have to create the chain of supply for the expect fast growing demand within the next 5 years and the outlook for such projects would be single building about 5 story building in the major cities or resort hotel with CLT and Gulam.

One of the largest wood distributors in Vietnam said: I will support to build a factory for CLT and Gulam including trial run of US tulipwood/yellow polar recommended by John. I can see the CLT and Gulam has a great potential market referring a short conversation at Sheraton Grand Opera Hotel”.

This was John’s recommendation in the previous meeting in November 2025 during the Vietnamwood held in HCMC.

### **Finding and Conclusion of the market report 2025**

2025 was a very challenging year. In 2025, the export of American hardwood to the Chinese and Southeast Asian markets combined amounted to \$1.46 billion, still accounting for 58% of the global export market.

The structure of the product supply chain in 2025 has changed. China and SE Asia especially with Vietnam have established closed partnership to saw US logs to produce lumber and slice Veneer to produce veneer.

The lumber and logs imported from US into China has dropped drastically compared to Vietnam which grew by a huge degree both in terms of value and quantity.

We hope in 2026, with the joint efforts of our American hardwood team and the Chinese wood industry and related industries, such interior design, architecture, sustainability engineers and the professional media across China, we can further enhance the commercial connections in the wood industry, convey environmental concepts to more professionals, and promote American hardwood, which integrates the advantages of low carbon footprint, exceptional qualities, and design potential.

## **Events Review**

### **Maison Shanghai & FMC Premium 2025: A Dual Showcase of Design and Manufacturing Excellence**

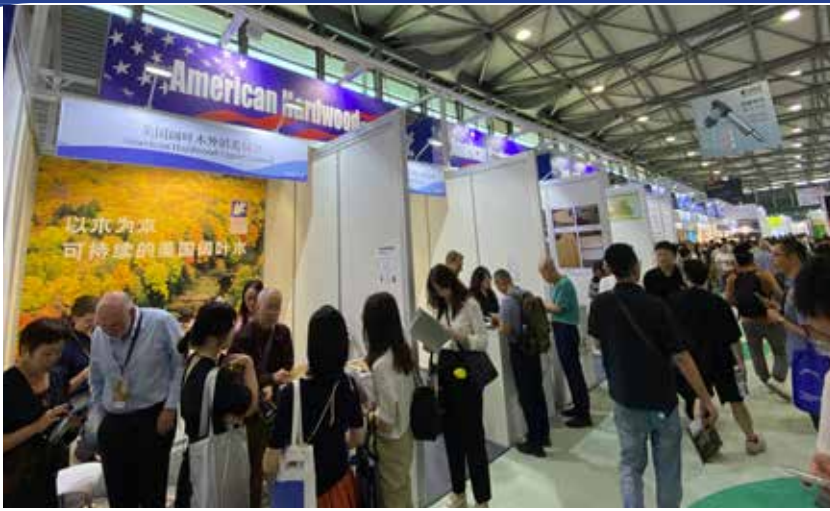
From September 9 to 13, Shanghai hosted two major industry events—Maison Shanghai 2025 and FMC Premium 2025—welcoming over 163,000 professionals and hundreds of brands. Maison Shanghai featured more than 800 furniture brands across themed zones focused on luxury design, digital art, wellness, and innovation. Highlights included the Design of Designers incubator, the Genie Award for small-space beauty, and the Aesthetic Show, which blended fashion with furniture. Concurrently, FMC Premium at SNIEC spotlighted furniture accessories, materials, and advanced manufacturing technologies, reinforcing its role as a vital hub for the global supply chain.

AHEC made a strong impression at both events. At Maison Shanghai, AHEC was invited to present the “Echoes of the Woods” exhibition in a complimentary 80sqm space. Five emerging Chinese designers created pieces using American hardwood, exploring themes of nature, humanity, and society. The exhibit attracted significant attention from design professionals and media. ATO Deputy Director Ted Shibata and Marketing Specialist Audrey Zhang attended the opening ceremony of

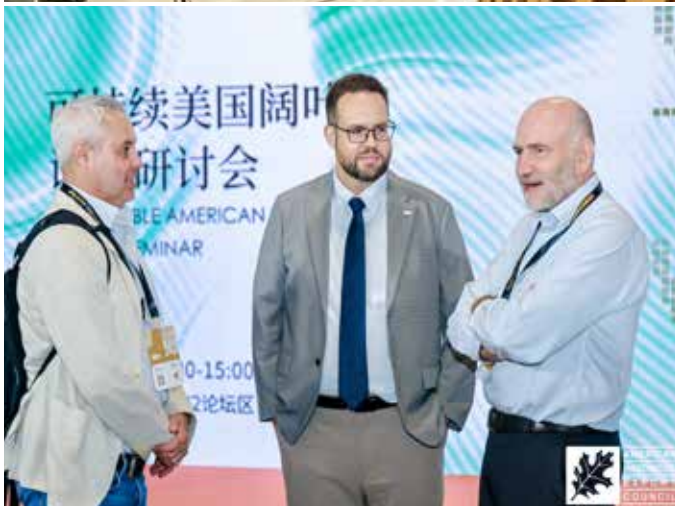
Maison Shanghai and visited the AHEC booth, where AHEC team introduced the “Echoes of the Woods” concept. The exhibits drew strong interest in both design and material sourcing, prompting professionals to visit the AHEC pavilion at FMC Premium for direct hardwood sourcing.



At FMC Premium, AHEC’s pavilion spanned 18 booths and featured 17 member companies, including American Lumber, Amos-Hill Associates Inc, Baillie Lumber, Blue Mountain Hardwood Inc, Brownlee Lumber, Cascade, CLC Hardwoods, Hardwood State Export Group, Thompson Hardwoods/Beasley Forest Products, Midwest Hardwood Company LLC, Missouri Walnut, NWH, Penn-Sylvan International, Rolling Ridge Woods, Rossi Group, Sonoking Corporation, Turman Group. Independent booths by CX Joy and Baillie Group further expanded AHEC’s presence. Throughout the FMC Premium Show, AHEC members reported high traffic and strong interest in American hardwood, with some securing new orders. Rupert Oliver provided updates on the American Hardwood Association and EUDR-related issues, while Alex Blamberg engaged with member companies to exchange market insights.



On September 10, Tripp Pryor, AHEC's International Program Manager, was interviewed by iqi.com, one of China's leading video platforms. He shared the inspiration behind "Echoes of the Woods" and highlighted the creative potential of U.S. hardwood in contemporary design. That afternoon, AHEC hosted a design salon featuring opening remarks by ATO Director Alex Blamberg and AHEC Regional Director John Chan. The event included a panel discussion with local designers, where Tripp joined as a panelist to speak on the sustainability and design versatility of American hardwood. The salon drew over 50 participants and reached a wider audience through its live broadcast, which attracted more than 11,000 viewers and received over 5,000 likes.





On September 12, AHEC participated in the ATO seminar, where Tripp Pryor presented on U.S. forest sustainability, export data, and hardwood applications such as CLT and Glulam. A reception followed, offering further dialogue with timber traders, who expressed concerns about tariff extensions and EUDR regulations.



AHEC's participation in Maison Shanghai and FMC Premium 2025 successfully advanced its mission to promote American hardwood in China's dynamic design and manufacturing sectors. The waived booth rental, collaboration with emerging designers, and strong media coverage amplified visibility and impact. The events provided valuable opportunities for stakeholder engagement, regulatory updates, and market expansion, reaffirming the importance of cultural and industry collaboration in driving innovation and sustainable growth for American hardwood exports in China.

## KARANA – A Collection Created by Hendro Hadinata and AHEC in September 2025

Drawing on the Balinese philosophy of Tri Hita Karana, which means harmony between people, nature and spirit, Hadinata has created three striking furniture pieces: the Kuta Bench, Sanur Lounge Chair, and Ubud Light. Inspired by the sculptural works of Ida Bagus Nyana in the 1930s, the collection blends elongated, flowing forms with contemporary function, offering design that is both culturally rooted and globally resonant.



What makes this collaboration unique is Hadinata's fresh engagement with American hardwoods. For Hadinata, the project was a chance to reflect on how new materials can inform his design process. Having previously worked mainly with locally sourced timbers, American cherry and red oak brought fresh challenges in terms of hardness, grain and colour, but also expanded the possibilities for future projects.

Equally important to the collection's success was the collaboration with Indonesian manufacturer Omega Mas. The craftsmen's skill and commitment gave the designs depth and precision. Together, the material and the craftsmanship came into their own when tackling the collection's most complex elements. While the Ubud Light initially seemed the most technically demanding because of its slim, organic form, it was in fact the bench and lounge chair that proved most challenging due to their continuous flowing lines. Achieving those curves required both precision and experience, which Omega Mas delivered through their manufacturing expertise.

The collaboration reflects AHEC's ongoing commitment to supporting creative experimentation with sustainable American hardwoods, bringing together global designers and local craftsmanship.

- Present at IDW 2025

The Karana Collection was presented at Indonesia Design Week, which ran from September 12–20, 2025. Over 800 people visited the showcase—80% were creative industry professionals and 20% were general visitors. Most inquiries focused on materials: how the products were made, what materials were used, how they differ from other timber, and the production process and durability of American red oak and cherry.



- **Fireside Chat with Suzy Anetta by Design Anthology**

On September 17, 2025, Hendro Hadinata spoke about his experience working on the KARANA collection with AHEC and his first time using American hardwoods in his project. He was joined by Suzy Anetta, co-founder of Design Anthology. A total of 32 participants attended the session.



- **Welcoming Night for KARANA Collection at IDW**

After the seminar, AHEC and Studio Hendro Hadinata hosted a welcoming night at the AHEC installation space in IDW Town Hall. They welcomed over 100 designers, furniture manufacturers, media representatives, ASMINDO Furniture Association members, and HDII Interior Design Association members. The event was well received by the local design and furniture community and was covered by key publications including Prestige Indonesia, MANUAL, Design Anthology, Indonesia Design, and InDesign—important media outlets for design and furniture in Indonesia and Southeast Asia.

- **Design Talk at IFFINA+ on September 18, 2025**

A seminar was held at IFFINA+ at ICE BSD on the topic of “Wood as a Sustainable Materials for Furniture and Product Design, supported by AHEC. Hendro Hadinata and Dennis Pluemer, Director of Santai Furniture, spoke to about 100 attendees about their views on sustainable design and how American hardwoods can support it.



## Taipei Building Show 2025

The 2025 Taipei Building Show (Dec 11–14 at TaiNEX 1) drew 68,772 registered visitors and a total venue attendance of 204,691, with strong engagement from professionals across building materials, construction, interior design, and architecture. AHEC participated within the U.S. Pavilion—organized by ATO Taipei and the Commercial Section of AIT—which occupied around 90 sqm on the 4/F. The AHEC booth, positioned prominently along the main aisle, covered 18 sqm and successfully attracted steady visitor traffic. The U.S. Pavilion’s opening ceremony on December 11 featured remarks from Karin Lang, Acting Director of AIT, and Morgan Haas, Chief of the Agricultural Affairs Section, who emphasized the value of U.S. participation and sustainable building materials. Both later visited the AHEC booth for in depth discussions, and Morgan convened a meeting with all U.S. exhibitors to gather input for 2026 program planning.

Throughout the show, AHEC engaged with key industry contacts, including Brian Yeh from Robinson Lumber, who shared hardwood market insights, and Andrew Kuo from Bestwood, who discussed business outlooks for U.S. hardwood in Taiwan and Vietnam. Saturday saw the highest traffic due to the Architect Festival, which brought 2,968 architects and 2,256 accompanying family members. Overall, the show hosted 491 exhibitors from 28 countries across 2,437 booths, reinforcing its role as a major platform for local building and materials industries.



## Upcoming Events in 2026

**May 15-18**  
**Qingdao International Furniture Fair\*\*\***  
 Qingdao, China

**July 29 – August 1**  
**Archidex**  
 Kuala Lumpur, Malaysia

**August 27-30**  
**Korea International Furniture & Interior Fair (KOFURN)**  
 Seoul, South Korea

**September 8-11**  
**FMC Premium 2026\*\*\***  
**The 31st Furniture Manufacturing & Supply China (FMC China 2026)**  
 Shanghai, China

**September 16-18**  
**Thailand International Woodworking & Furniture Exhibition\*\*\***  
 Bangkok, Thailand

**September 23-26**  
**IFMAC WoodMac**  
 Jakarta, Indonesia

**September 30-October 3**  
**Vietnam Interior & Build Expo & Hoa Mai Design Awards**  
 Ho Chi Minh City, Vietnam

**December 10-13**  
**The 38th Taipei International Building, Construction and Decoration Exhibition 2026**  
 Taipei, Taiwan

\*\*\*AHEC pavilion

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