American Hardwood Export Council Europe Market Report

September 2026



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MARKET UPDATE



Focus on Spain as importers report a shrinking market for solid lumber

PAGE 2>

ACTIVITES



Wood for the Trees at London Design Festival 2026

PAGE 3>

NEWS



AHA closes gap on EUDR conformance: harvest site data layer scheduled for October launch

PAGE 5>

MARKET UPDATE

Focus on Spain as importers report a shrinking market for solid lumber

According to a few key hardwood importers AHEC has spoken to, the general market situation is experiencing a sharp fall in consumption of all types of timber (tropical hardwoods, softwoods and temperate hardwoods). June and July – which traditionally are good months for timber consumption – were weak, indicating a decline in activity. According to the importers, the reasons for this decline in activity include international



U.S. hardwood demand remains subdued in Spain, though white oak and walnut sales are showing signs of improvement.

developments and news that are discouraging investment. In their view, the resulting uncertainty is making potential investors reluctant to take risks. One of the concerns raised was the possibility of an emerging public debt crisis, which could lead to higher interest rates and further worsen the situation. These comments contradict published economic forecasts, which indicate the general outlook for the Spanish economy is a positive one and it is currently in better shape than many of its fellow EU members. The Confederation of Spanish Businesses (CEOE) has raised its economic growth forecast (GDP) for 2026 to 2.7%. However, they do acknowledge the shadow cast by the Global energy crisis and higher borrowing and living costs, has not gone away, which is why the CEOE forecasts a slowdown in economic growth in 2027 to 2.1%.

According to members of the Spanish Wood Importers Association (AEIM), who met in September in Madrid, the market for U.S. hardwoods remains somewhat weak in terms of demand, although some importers reported that white oak and walnut are beginning to show signs of improved sales. According to the latest export data from the USDA, U.S. hardwood lumber exports to July this year are up 3% on the same period last year at 15,192m^3. White oak (+ 10%) at 10,079m^3 and red oak (-6%) at 3,474m^3 together account for nearly 90% of total shipments for this period. AEIM members reported that there was slow buying activity over the summer, but they report that there has been an increase in forward buying activity from the beginning of September.

Market for U.S. hardwoods

One of the main consumption sectors for solid wood – and therefore U.S. hardwood – is the high-end refurbishment of hotels, restaurants and homes. Importers are reporting that demand is weak and, although some timber is being sold in the market, volumes are down on what they were a few years ago, with most of the demand still linked to tourism. However, importers are concerned that there is a lack of new investment in tourist infrastructure, especially from foreign developers that have been responsible in the past for pouring money into the luxury real estate market and this has dried up.

The sector of the construction market that is performing well is the non-luxury segment. As a result, demand is mainly for panels and melamine-faced boards with well-developed designs. In this market, solid wood is struggling to compete and, where it is used, it is increasingly used for door sub frames which are made of softwood.

Stock levels

As a result of slower demand for solid lumber, stocks are reported by some specialist hardwood importers as sufficient to meet current levels of interest. One importer told AHEC they are currently holding 50% less stock than they normally do in all hardwood, as they are concerned about purchasing material now that may arrive after 31 December when the EUDR comes into force. They have been receiving AHA statements from their U.S. hardwood suppliers, but when they enter the data into the EU Traces system, they have not been receiving the necessary import code. AHEC are looking into this as we believe this will be resolved once the new deforestation analysis is released in October (see news update) as it will also

provide the option for importers to download harvest sites in each county identified by the AHA platform.

Furniture

The furniture sector is also feeling the impact of weaker demand for high end furniture used in hotels, restaurants and residential refurbishment projects. The rest of the wood furniture market is dominated by cheaper low-cost furniture based around veneered panels and, increasingly, more competitively priced laminate and non-wood surfaces. There is also an increasing amount of artificial or fake wood surfaces entering the market both in products and interiors.



High-end furniture demand is weakening, while lower-cost materials gain ground and red oak becomes an increasingly competitive hardwood option.

U.S. hardwood species

The feedback on white oak activity is mixed amongst importers. It has always been an important species in the market and most hardwood importers and distributors stock or trade in it. The general opinion is that it is beginning to move in the marketplace again as prices have eased, although recent price increases in comparable grades of European oak may also be a factor.

As borne out by the export data, red oak is becoming increasingly important. The feedback suggests it is not driven by fashion for the species, more as a replacement for other hardwoods in the market such as beech and a more competitive oak option when colour finishes allow.

Of the other species, walnut and ash have a place in the market, but volumes are very small in comparison to the oaks, the same for tulipwood. As one importer put it “if tulipwood is competitively priced it moves quite well but when prices rise demand dries up.”

ACTIVITIES

Wood for the Trees at London Design Festival 2026

Following its launch at 3daysofdesign in Copenhagen in June 2026, AHEC brought Wood for the Trees to London for the inaugural Shoreditch Design Week, as part of London Design Festival, 15–20 September 2026. The exhibition was refreshed and expanded specifically for its new setting at The Tab Centre in Shoreditch, giving the project a distinct spatial identity and a broader programme of engagement.



Environmental journalist and writer Fred Pearce discusses forests, sustainable forestry and climate hope.

Rather than simply recreating the Copenhagen installation, the London edition was redesigned to respond to the character and scale of the venue. Developed by London-based studio Mitre & Mondays and brought to life by Benchmark, the installation invited visitors to explore the journey of American hardwood from forest to finished product, while examining the environmental systems, management practices and material choices that underpin responsible forestry.

A highly targeted audience

London provided an important platform for Wood for

the Trees, bringing the exhibition to a highly relevant audience of architects, designers, makers, students and media as part of London Design Festival. A selected group of European press was also invited to experience the exhibition, helping to extend the project's reach across key European markets.
The quality of the audience and level of interaction throughout the week demonstrated the value of bringing the forest-to-furniture story directly to the design community, particularly to those making decisions around material selection and specification.

A programme of engagement

The supporting programme of events extended Wood for the Trees beyond the exhibition itself, creating multiple opportunities to explore themes of forestry, timber and responsible material use.



Van Wagner explores forest ecosystems, tree communication and wood species through hands-on activities.

Visitors could attend a special screening of AHEC's Forested Future documentary, take part in talks and discussions on responsible forestry, timber specification and longevity, and join practical workshops offering a more direct experience of the material.

The hands-on activities were particularly valuable in bringing these themes to life. Students, members of the local community, architects, designers and journalists had the opportunity to handle and work with the timber, experiencing first-hand the grain, knots, colour variation and tactility of No.1 Common material. Participants included professionals from leading practices such as Zaha Hadid Architects, alongside editors of key industry media, creating an informal and diverse exchange around the qualities and potential of American hardwood. Working with the material also allowed attendees to consider how working with different species, grades and characteristics might shape their own work, and many shared their positive workshop experiences with their social media audiences.



Hands-on workshops gave visitors the chance to experience the character and potential of American hardwood first-hand.

What the media took away

Media coverage of the London presentation focused on the way Wood for the Trees turned the story of timber, forestry and natural material variation into an engaging design experience. To date, the London edition has generated 60 online clippings, reaching a potential audience of 43.3 million.

Disegno highlighted the use of No.1 Common throughout the installation, drawing attention to a grade often overlooked because of characteristics such as knots and grain variation, and to the exhibition's demonstration of how these natural qualities can be embraced rather than concealed.

Dezeen selected Wood for the Trees among its recommendations of what to see during London Design Festival, describing the installation as an "abstracted woodland" in which to contemplate responsible forestry. In Spain, Manera Magazine captured the wider ambition particularly succinctly, observing that visitors "enter looking at the wood and leave thinking about the forest".

Taken together, the coverage highlighted the exhibition's ability to shift the conversation beyond the finished object and towards the material's natural characteristics, provenance and relationship with the forest. The media response also picked up on the project's ties to Forested Future and American Hardwood Assured, reinforcing AHEC's wider messaging and values. See here for a round up of selected media coverage and social media highlights

A broader platform for AHEC's message
The combination of exhibition, film, talks, workshops and informal encounters gave Wood for the Trees a broad platform through which to explore the relationship between forest management, material knowledge, design, craftsmanship and provenance.



Wood for the Trees reached a wider audience through extensive media coverage and social content, bringing AHEC's message around forests, materials and responsible design to new audiences.

Not only did the show engage visitors in person, but its messaging found audiences well beyond the venue through social content AHEC created and shared throughout the week. Reels capturing the atmosphere of the days extended the project's audience, while collaboration posts with partners, including Shoreditch Design Week (16.3K followers), introduced our work to new communities. Head to our Instagram to see what was created.

Shoreditch Design Week itself described Wood for the Trees as a "standout showcase", highlighting its contribution to the conversation around sustainable design and the future of forests in the UK. In its first year, the festival firmly established itself as an important fixture in the design calendar, drawing significant footfall from industry professionals and the public alike.

Overall, the London presentation represented a significant evolution of Wood for the Trees. It created valuable opportunities to continue the conversation around responsible forestry, material diversity and the potential of American hardwoods, while demonstrating how design can help make the relationship between forests and the materials we use more visible and tangible.

NEWS

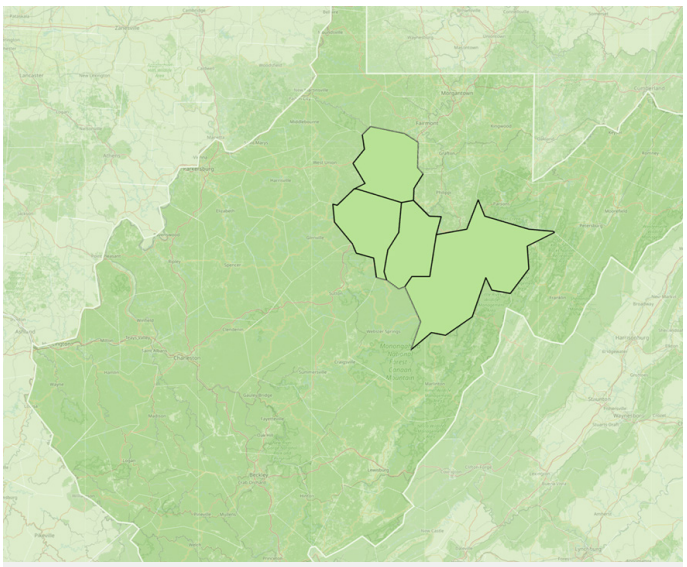
AHA closes gap on EUDR conformance: harvest site data layer scheduled for October launch

Following the update in the June/July Europe Market Report, work to deliver the new harvest site data layer has progressed well and it is scheduled to launch on the AHA platform by 16 October 2026. This is a significant development in AHA's ability to support EU importers' EUDR due diligence, providing more detailed geolocation information without adding harvest site data collection requirements for platform users.

Behind this development lies an intensive programme of technical innovation. Identifying numerous small, low-intensity selective harvests across U.S. hardwood forests is particularly challenging because they often leave much of the canopy intact and are difficult to distinguish from natural disturbance. The AHA team has combined AI analysis of changes across multiple spectral bands in satellite imagery with corroborating data on forest structure and biomass. Expert review of high-resolution imagery through AHA's "Expert Eye" tool provides additional checks and training data to improve detection. Advances in processing power and AI have made it possible to apply these techniques at the scale required.

The new layer will identify harvest site geolocations across all assessed U.S. hardwood counties for the preceding 12 months. It will provide polygons for harvests greater than four hectares and points for smaller or selective harvests. AHA users and recipients of AHA Statements will be able to generate a separate GeoJSON file containing the comprehensive pool of real and potential harvest sites within their source counties. This is designed to support a "declaration in excess" approach for

aggregated or commingled material, while protecting commercially sensitive information about individual landowner supply arrangements.

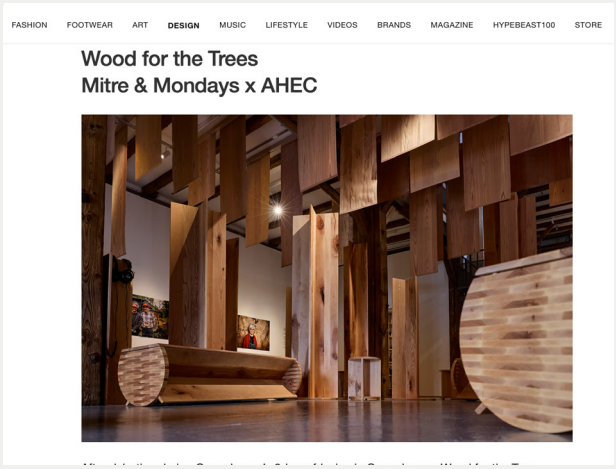


AHA's new harvest-site data layer will provide detailed geolocation information to support EU importers with EUDR due diligence.

Development has been informed by close consultation with U.S. exporters, the wider U.S. forest products sector and EU importers, with encouraging feedback. The harvest site data delivered by the AHA Platform is undergoing rigorous pilot testing on the TRACES "Acceptance" server to ensure full compatibility with the technical requirements for submitting geolocation data for EUDR conformance purposes. In a recent discussion, an experienced EU importer compliance specialist welcomed the harvest site approach and praised AHA's assessment methodology as a strong foundation for building a defensible due diligence process in line with EUDR requirements.

The AHEC and BWA team will deliver a series of online briefings, initially targeting registered Platform users and EU importers, to explain the new data layer and its use. We will also engage directly with key EU Member State Competent Authorities and the European Commission. As the launch represents a significant change in the scope of data delivered by AHA, registered users will be required to agree to updated Terms and Conditions when accessing the platform after launch. These include specific provisions governing the use and onward sharing of harvest site data for EUDR purposes.

Wood for the Trees
Press Highlights



HYPEBEAST

After debuting during Copenhagen's 3daysofdesign in Copenhagen, Wood for the Trees arrives in Mitre & Mondays' home town of London, traces timber's journey from forest to finished object. The space is transformed into an abstract woodland, combining tactile installations and audio-visual storytelling to make the case for responsible forestry.

Read full article here

5.9M MONTHLY UNIQUE USERS

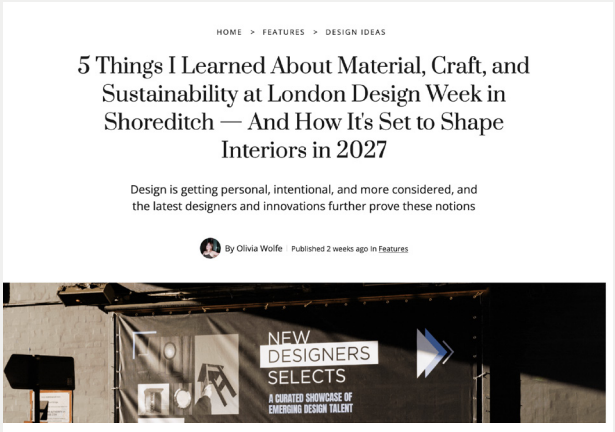


DEZEEN

Wood for the Trees at the Tab Centre in Shoreditch, an "abstracted woodland" in which to contemplate responsible forestry, designed by London-based Mitre & Mondays for the American Hardwood Export Council.

Read full article here

3M MONTHLY UNIQUE USERS



LIVINGETC

An interesting detail of the exhibit was that every piece on display was actually simple Number One Common wood — also known as 'cabinet grade.' This kind of wood sits below the top-tier timber that you would normally see in luxury design, yet it was still striking and beautifully crafted. The point being, with the right designs and approaches, we have materials and resources all around us that can be made into really fantastic furniture pieces.

Read full article here

711.8K MONTHLY UNIQUE USERS

Wood for the Trees
Press Highlights



Wood for the Trees Shows the Untapped Potential of American Hardwood

London studio Mitre & Mondays designed the American Hardwood Export Council's walk-in forest of four species to come apart, so every piece can be reused.

JASON ROSS
Tue 29 September 26

WOOD CENTRAL (AUSTRALIA)

Imagine if architects and designers could fully utilise the value of every hardwood log, including the boards with knots and colour shifts that rarely make it into European design. That idea became Wood for the Trees, a six-stage walk-in forest at Shoreditch Design Week earlier this month, with every column, stool, bench, and hanging veneer built from No.1 Common timber.

Read full article here

220K MONTHLY UNIQUE USERS



ART

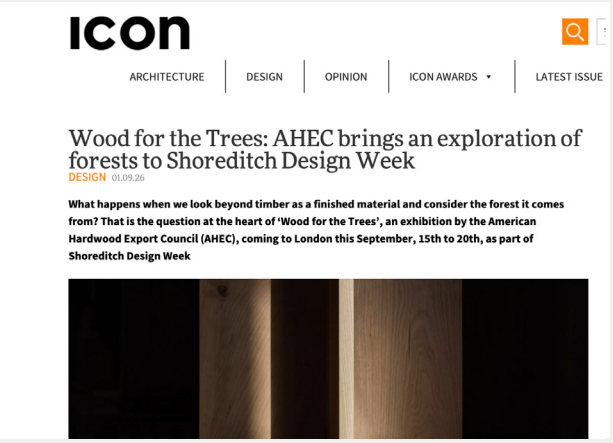
EXHIBITION
Wood for the Trees - AHEC
15 Sep 2026 - 20 Sep 2026

ART RABBIT

Wood for the Trees invites visitors to experience a meditative journey through the life of American hardwood – from forest to finished product. Inspired by AHEC's feature-length documentary Forested Future, the London exhibition combines striking spatial design with compelling educational storytelling to explore responsible forestry, sustainable material choices and the vital role our forests play in building a more resilient future.

Read full article here

133K MONTHLY UNIQUE USERS



ICON

ARCHITECTURE | DESIGN | OPINION | ICON AWARDS | LATEST ISSUE

Wood for the Trees: AHEC brings an exploration of forests to Shoreditch Design Week

DESIGN 01.09.26

What happens when we look beyond timber as a finished material and consider the forest it comes from? That is the question at the heart of 'Wood for the Trees', an exhibition by the American Hardwood Export Council (AHEC), coming to London this September, 15th to 20th, as part of Shoreditch Design Week

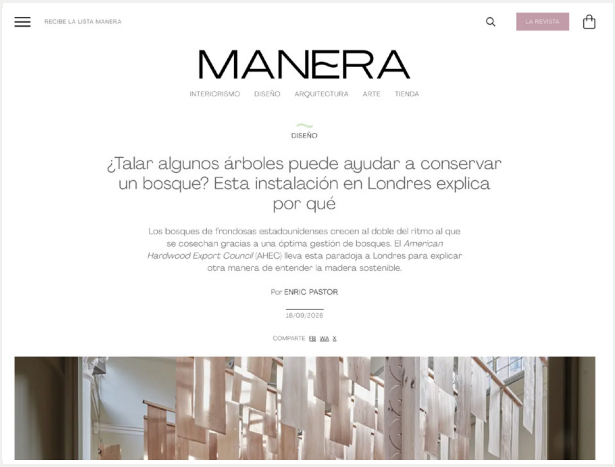
ICON

Its central argument is that material choices can play a role in supporting the long-term stewardship of forests, particularly through the use of a more diverse range of timber species.

Read full article here

105K MONTHLY UNIQUE USERS

Wood for the Trees
Press Highlights

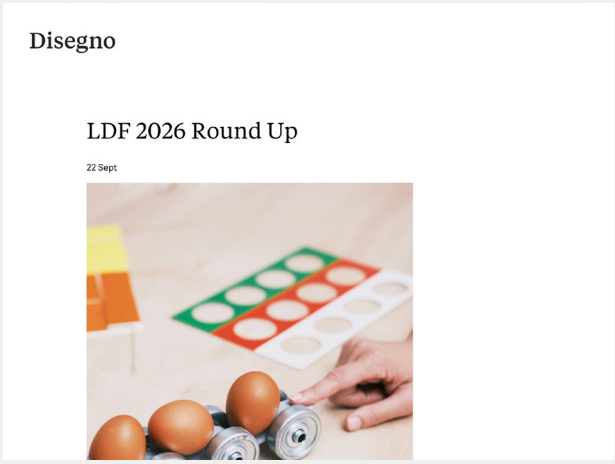


MANERA (SPAIN)

AHEC argues that using a greater diversity of underutilized species and grades can balance demand and help maintain diverse forests. This means accepting knots, color variations, smaller pieces, and woods that the European market typically considers less desirable. In other words, perhaps we need to train our tastes to be a little more like the forest itself.

Read full article here

100K MONTHLY UNIQUE USERS



DISEGNO

If AHEC has previously excelled at telling the technical story of timber, Wood for the Trees is a good example of how the organisation has adapted its remit to broaden what that story is: no longer simply a narrative about a structural material, but also the story of the ecosystems, communities and usages that surround it.

Read full article here

27K MONTHLY UNIQUE USERS



ART&COLLECTIONS

Its central argument is that material choices can play a role in supporting the long-term stewardship of forests, particularly through the use of a more diverse range of timber species.

Read full article here

17.7K MONTHLY UNIQUE USERS

Social media highlights



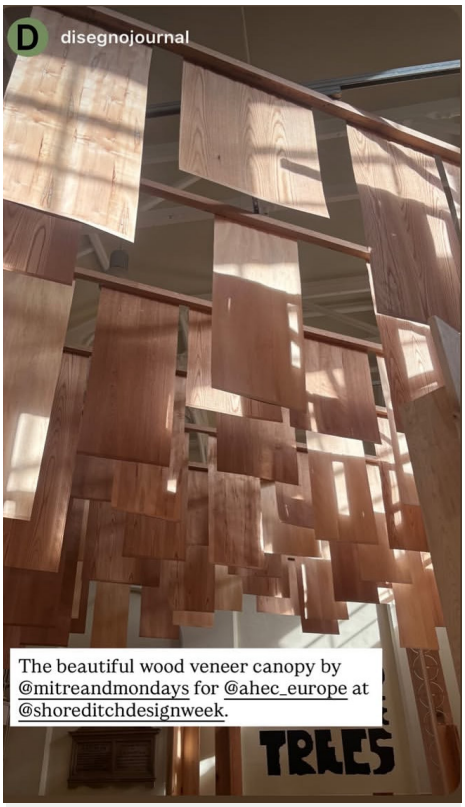
@L_D_F_OFFICIAL
327K FOLLOWERS



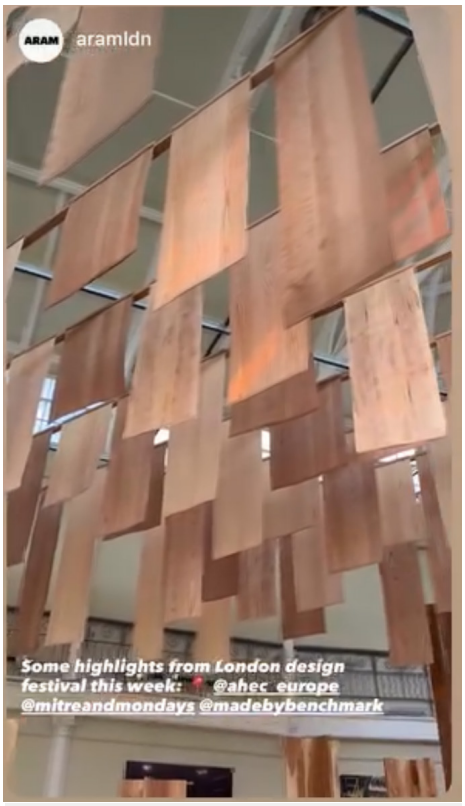
@WILLYOUNGOFFCIAL
311K FOLLOWERS



@GRAINANDKNOT
143K FOLLOWERS



@IDISEGNOJOURNAL
33K FOLLOWERS



@ARAMLDN
30.9K FOLLOWERS



@KATIETREGGIDEN.1
21.7K FOLLOWERS