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AMID RAW MATERIAL CHALLENGES AND INNOVATION OPPORTUNITIES, THE EUROPEAN HARDWOOD INDUSTRY LOOKS TO THE FUTURE AT THE IHC 2026

On November 5/6 the 11th edition of the International Hardwood Conference was held in Antwerp. The event was hosted by Fedustria – the Belgian trade federation that represents and supports the textile, wood, furniture, and design industries -, and jointly organised in cooperation with the conference's longstanding partners, the European Timber Trade Federation (ETTF) and the European Organization of the Sawmill Industry (EOS).

This year, the event drew about 170 participants from around the world – a record audience for the International Hardwood Conference (IHC). On November 5, participants took part in an interesting tour of the port of Antwerp. On November 6, the Conference Day, the event opened with a welcoming speech given by Mrs Maria Kiefer-Polz, EOS Hardwood Vice-President, and Mr Ad Wesselink, ETTF President. The first presentation of the day was given by Katja De Vos of Fedustria, who shared research highlighting the positive impact of wood on human well-being. The findings showed that being surrounded by wood can reduce stress, enhance well-being and strengthen emotional intelligence. Jean-François Guilbert of French Timber then presented an overview of international trade flows in temperate hardwood logs and lumber. His analysis highlighted a long-term decline in the production of temperate sawn hardwood. He also stressed the importance of adding value to natural resources as a driver of long-term economic prosperity. In this context, the continued export of large volumes of unprocessed logs from Europe and North America represents a missed opportunity for local industries. In the future, European hardwood producers can possibly position themselves as producers of premium products in niche markets. Professor Bart Muys of KU Leuven addressed the long-term availability of wood for the industry. While forest areas are expanding across Europe, particularly those dominated by broadleaved species, forest vitality is declining as disturbances become increasingly frequent. He highlighted that hardwoods are expected to become more readily available in European forests hence developing new applications and markets for these resources will therefore be essential to making the most of this growing potential.

Florence Perrucaud of the Ducerf Group presented an overview of the oak market, with a particular focus on France. Against a backdrop of weak construction activity and subdued overall demand, the oak industry continues to face challenging market conditions. Flooring and stave markets are experiencing a slowdown, while joinery and carpentry are showing more positive developments. Nevertheless, oak remains a favourite among consumers, thanks to its technical properties and aesthetic appeal. The overview of Europe's main hardwood species continued with Roland Feit of Abalon Hardwood, who focused on the beech market, particularly in Germany. Sawn beech

production has been declining in the country for several years. Log exports remain a concern for the sector, but not the only one: for example, widespread use of logs for firewood further reduces the availability of raw material for industrial processing. Climate change is also affecting log quality, while the impact of European legislation seems to have a net negative impact on availability. On a more positive note, research is underway to identify new applications for beech, such as using lower-quality material for strip-like lamination, as an example.

Michael Snow of the American Hardwood Export Council (AHEC) then provided an overview of the US hardwood market. The long-term decline in American hardwood production is becoming increasingly evident, driven by falling consumption across virtually all market segments. US hardwood lumber exports peaked in 2017, largely fuelled by strong Chinese demand, but subsequently declined as the Chinese market weakened. For American hardwood exporters, diversifying export destinations beyond China has therefore become a key priority. The export of US hardwood logs to Vietnam and China also remains an important issue for the industry. This provided a natural introduction to the next presentation, in which David Holvoet of Treecraft examined developments in the Chinese and Vietnamese markets. China's construction sector downturn has had a significant impact on hardwood consumption. Although overall demand has weakened, the remaining market is probably more focused on quality. Vietnam, meanwhile, should be viewed as closely integrated with the Chinese market, while its domestic market remains considerably smaller.

The first part of the afternoon focused on tropical timber markets and sustainable forest management. Dr Richard Gyimah of the Forestry Commission of Ghana presented Ghana's FLEGT licensing system, highlighting the country's robust standards for ensuring timber legality, while also ticking off many EUDR-boxes. He stressed that a reliable chain-of-custody system is fundamental to sustainable forest management. Eli Prins of Probos then turned the focus to tropical timber from the Congo Basin. While loss of net-forest area remains a challenge in many regions, mainly due to converting to agricultural land and the use of firewood, certified sustainable forest management is gaining momentum. Exports of sawn timber from the Congo Basin to Europe have declined since peaking around 20 years ago, but Europe remains an important destination for the region's timber products. Rafeek Khan provided an overview of Guyana's tropical hardwood industry. Against a backdrop of rapid economic growth, the country's sawmill industry is also expanding, with an increasing focus on domestic processing and added value. The conference then turned to technological innovation, with Sampsa Auvinen, President of Fordaq, delivering a presentation on the growing role of artificial intelligence (AI) in the timber industry, particularly in automated log and sawn-timber grading. Although some challenges remain, these technologies are increasingly demonstrating their potential to outperform traditional manual grading methods.

The final part of the conference focused on hardwood applications. Lorenzo Onofri of the European Parquet Federation provided an update on the European wood flooring industry. He identified several key challenges, including challenging competition from China, competition from wood-look alternatives and, echoing previous speakers, raw material availability. Although parquet production has recently increased, it remains well below levels recorded a few years ago. Alessandra Tracogna of CSIL presented an overview of the furniture industry. Europe accounts for 25% of global furniture production, a share that has remained stable over the past decade. However, production has been declining since 2022 amid increasing market volatility. More than 20% of furniture consumed in Europe is imported, with China being the main supplier. Meanwhile, demand for natural materials and surfaces remains strong.

Claudiu Sonda of CEI-Bois reviewed the numerous EU policies shaping timber construction, highlighting both challenges and opportunities for the European wood industry. He focused in

particular on the Construction Products Regulation (CPR). Mandatory life-cycle environmental performance requirements may increase costs, but harmonised rules across EU markets should also help reduce trade barriers. Imke de Windt of Wood.be delivered the day's final presentation on thermally modified wood. Wood modification processes, including thermal treatment, aim to improve durability and extend service life without releasing harmful substances. However, these treatments can also have drawbacks, as modified wood may lose some of its mechanical strength.

The next edition of the International Hardwood Conference will take place in Rome in 2028. More information will follow in due course. For more information on the IHC 2026 edition, please visit https://www.ihc-hardwood.com/