

Global Radiata Pine Logs & Lumber Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GA3DD207629DEN.html>

Date: June 2026

Pages: 181

Price: US\$ 4,480.00 (Single User License)

ID: GA3DD207629DEN

Abstracts

The global Radiata Pine Logs & Lumber market size is expected to reach \$ 12486 million by 2032, rising at a market growth of 2.4% CAGR during the forecast period (2026-2032).

Radiata Pine Logs & Lumber refer to natural roundwood harvested from the fast-growing softwood species *Pinus radiata* (also known as *Pinus insignis*), native to the California coast in the United States, and the sawn timber produced by sawing, cutting and kiln drying such logs. The species has been extensively planted in plantation forests worldwide since the 19th century, with New Zealand, Chile, Australia and Spain emerging as the largest producers. Radiata Pine is valued for its short rotation (approximately 25-30 years), medium density (air-dry density 0.45-0.55 g/cm³), straight trunk with few knots, uniform texture, excellent workability, good drying performance, and satisfactory nail-holding and gluing properties. It is widely used in light wood-frame construction, engineered wood products (CLT cross-laminated timber, LVL laminated veneer lumber), concrete formwork, building finishing, export packaging, furniture manufacturing, finger-jointed blockboard, and preservative-treated outdoor applications such as fencing and landscaping. As the highest-volume traded softwood species globally with highly concentrated production and deep supply chain integration with China, Radiata Pine provides foundational raw material support for global timber construction, logistics packaging and wood-based panel industries.

Radiata pine logs and lumber constitute the highest-volume and most stable single softwood species in global trade, with prices closely tied to construction activity, particularly demand from China. In 2025-2026, New Zealand A-grade logs (30-34 cm small-end diameter) landed in China at 110-125 US dollars per cubic meter, a modest year-on-year decline; after domestic processing, construction lumber ex-mill prices

ranged 1,200?1,400 RMB per cubic meter, while furniture?grade clearwood reached 2,000?2,200 RMB per cubic meter. Gross margins vary significantly along the value chain: large New Zealand forest owners (e.g., Pan Pac, Sequal) with captive plantations achieve 25%?30% on log sales; pure Chinese trading intermediaries operate on 3%?5% margins; integrated processing and trading firms (e.g., Jingjiang Guolin, Shandong Zhonghao) generate 12%?18% margins through scale and vertical coordination. Downstream, China absorbs roughly 65%?70% of global radiata pine log imports, with construction formwork and packaging pallets accounting for about 50% of domestic consumption, engineered wood (LVL, CLT) 15%, furniture and joinery 20%, and pulp and other uses 15%. Incremental demand comes from three sources: first, China's prefabricated building policies are driving LVL and CLT penetration in tourism real estate, schools and sports venues; second, India has emerged as a new growth pole – New Zealand's timber exports to India surged from 9.5 million NZ dollars in 2023 to 76.5 million in 2024, with continued strong growth in 2025; third, infrastructure construction in the Middle East and Southeast Asia is lifting structural lumber exports. Challenges remain notable: supply constraints in New Zealand due to rising shipping costs and labor shortages reduced harvest in some regions in 2025; China's real estate new starts fell for a third consecutive year, weakening formwork demand and leaving some small?scale processors underutilized; South American producers (Chile, Argentina) are expanding exports to Asia, creating competitive pressure on New Zealand. The competitive landscape features oligopolistic supply concentrated in New Zealand – the top five forest owners control roughly 60% of log exports – but highly fragmented consumption?side processing in China, with clusters in Rizhao (Shandong), Jingjiang (Jiangsu) and Zhangzhou (Fujian). In 2026, Ingka Investments (IKEA parent) acquired former Greenheart plantation assets, becoming a major new landowner and likely driving the radiata pine supply chain toward FSC certification and carbon neutrality. Key uncertainties include: first, the pace of China's real estate recovery and infrastructure spending; second, the speed at which emerging suppliers (Chile, Australia, Argentina) increase shipments to China; third, whether the EU Carbon Border Adjustment Mechanism (CBAM) extends to timber and wood products, affecting export cost structures. In summary, radiata pine logs and lumber will maintain moderate growth (2%?3% annually), with prices fluctuating modestly within a narrow band as supply and demand balance. China's market is shifting from volume expansion to value optimization, shifting the profit focus to value?added products (clear finger?jointed stock, engineered wood, treated timber).

This report studies the global Radiata Pine Logs & Lumber production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Radiata Pine Logs & Lumber and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Radiata Pine Logs & Lumber that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Radiata Pine Logs & Lumber total production and demand, 2021-2032, (Cubic Meter)

Global Radiata Pine Logs & Lumber total production value, 2021-2032, (USD Million)

Global Radiata Pine Logs & Lumber production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Cubic Meter), (based on production site)

Global Radiata Pine Logs & Lumber consumption by region & country, CAGR, 2021-2032 & (Cubic Meter)

U.S. VS China: Radiata Pine Logs & Lumber domestic production, consumption, key domestic manufacturers and share

Global Radiata Pine Logs & Lumber production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Cubic Meter)

Global Radiata Pine Logs & Lumber production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Cubic Meter)

Global Radiata Pine Logs & Lumber production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Cubic Meter)

This report profiles key players in the global Radiata Pine Logs & Lumber market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Arauco, CMPC, China Forestry Group, Pan Pac, Sequal Lumber, China Forest Products, Shanghai Ouyang Haojie Group, Craigpine Timber, Acon Timber (HS Timber Group), ARM, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Radiata Pine Logs & Lumber market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (Cubic Meter) and average price (US\$/Cubic Meter) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Radiata Pine Logs & Lumber Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Radiata Pine Logs & Lumber Market, Segmentation by Type:

Pruned (Clearwood) Logs (e.g., P40 - minimum SED 40cm)

K-Grade Logs (e.g., KIS, KI, K – unpruned, structural)

A-Grade Logs (e.g., Small A, Medium A)

Industrial / Pulp Logs

Global Radiata Pine Logs & Lumber Market, Segmentation by Grade:

Clear Grades (No.1 Clear, No.2 Clear, etc. per NZS 3631)

Appearance Grades (Select, Standard per NZS 3631 / AS 1489)

Structural Grades (e.g., No.1 Framing per NLGA; GS/G1/G2 per NCh1217;
C16/C18/C24 per EN 338)

Industrial Grade

Global Radiata Pine Logs & Lumber Market, Segmentation by Application:

Residential & Light Construction

Commercial & Heavy Construction

Furniture & Joinery

Packaging & Pallets

Engineered Wood Products

Others

Companies Profiled:

Arauco

CMPC

China Forestry Group

Pan Pac

Sequal Lumber

China Forest Products

Shanghai Ouyang Haojie Group

Craigpine Timber

Acon Timber (HS Timber Group)

ARM

Ingka Investments Forest Assets NZ

Shandong Zhonghao Wood

Shandong Hualong Wood

Jiangsu Chensheng Forestry

Fortune Wood

Fortuna Forest Products

Maderas Pascual

Forestal Lix

Fujian Zhiyi Wood

Shanghai Xiangda Wood

Qingdao Yijiaren Wood

Tenco

Southern Cross Forest Products

IFP International Forest Products

DNF Pacific Group

Forestal LV

Key Questions Answered:

1. How big is the global Radiata Pine Logs & Lumber market?
2. What is the demand of the global Radiata Pine Logs & Lumber market?
3. What is the year over year growth of the global Radiata Pine Logs & Lumber market?
4. What is the production and production value of the global Radiata Pine Logs & Lumber market?
5. Who are the key producers in the global Radiata Pine Logs & Lumber market?
6. What are the growth factors driving the market demand?

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