

Global Radiata Pine Logs & Lumber Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Radiata Pine Logs & Lumber market size was valued at US\$ 10495 million in 2025 and is forecast to a readjusted size of US\$ 12486 million by 2032 with a CAGR of 2.4% during review period.

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 is a detailed and comprehensive analysis for global Radiata Pine Logs &

Lumber market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Radiata Pine Logs & Lumber market size and forecasts, in consumption value (\$ Million), sales quantity (Cubic Meter), and average selling prices (US\$/Cubic Meter), 2021-2032

Global Radiata Pine Logs & Lumber market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Cubic Meter), and average selling prices (US\$/Cubic Meter), 2021-2032

Global Radiata Pine Logs & Lumber market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Cubic Meter), and average selling prices (US\$/Cubic Meter), 2021-2032

Global Radiata Pine Logs & Lumber market shares of main players, shipments in revenue (\$ Million), sales quantity (Cubic Meter), and ASP (US\$/Cubic Meter), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Radiata Pine Logs & Lumber
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Radiata Pine Logs & Lumber market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

Radiata Pine Logs & Lumber market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment 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

Market segment 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

Market segment by Application

Residential & Light Construction

Commercial & Heavy Construction

Furniture & Joinery

Packaging & Pallets

Engineered Wood Products

Others

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Radiata Pine Logs & Lumber product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Radiata Pine Logs & Lumber, with price, sales quantity, revenue, and global market share of Radiata Pine Logs & Lumber from 2021 to 2026.

Chapter 3, the Radiata Pine Logs & Lumber competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Radiata Pine Logs & Lumber breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Radiata Pine Logs & Lumber market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Radiata Pine Logs & Lumber.

Chapter 14 and 15, to describe Radiata Pine Logs & Lumber sales channel, distributors, customers, research findings and conclusion.

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