

Global Thermal Treatment Modified Wood Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Thermal Treatment Modified Wood market size is expected to reach \$ 1030 million by 2032, rising at a market growth of 7.3% CAGR during the forecast period (2026-2032).

Thermally modified wood refers to solid wood products manufactured by treating natural timber at approximately 160-230°C in a low-oxygen, steam, nitrogen, vacuum or otherwise controlled atmosphere. The process modifies hemicellulose, extractives and hydrophilic groups in the wood cell wall, reducing moisture uptake while improving dimensional stability, decay resistance and outdoor service performance. Major product forms include thermally modified boards, exterior cladding, decking, decorative profiles, sauna boards, interior panels, furniture panels and wood components for windows and doors. Common wood species include pine, spruce, ash, poplar, birch, oak, red pine and radiata pine.

Thermally modified wood is mainly produced in Finland, Estonia, Sweden, Denmark, Belgium, Poland, Turkey, the United States, Canada, China, Japan and Malaysia, with Europe remaining the most mature region in terms of process standards, certification systems and architectural applications. The product is widely used in building facades, outdoor terraces, landscaping, saunas, interior wall and ceiling decoration, premium furniture, window and door components and commercial-space decoration. It is an important sustainable solid-wood modification material distinct from chemically pressure-treated wood, tropical hardwood, conventional kiln-dried lumber and wood-plastic composites. USDA Forest Products Laboratory research also indicates that thermal modification can reduce wood hygroscopicity and improve dimensional stability and decay resistance, while application boundaries still need to be carefully considered under severe decay or termite pressure.

In 2025, global thermally modified wood production reached approximately 0.62-0.66 million cubic meters. Certified European ThermoWood® products remained the core supply base, while non-certified or locally produced thermally modified wood from North America, China, Japan, Turkey and Southeast Asia continued to add incremental supply. The average global FOB price of thermally modified wood was approximately USD 900-980 per cubic meter in 2025, with standard softwood boards and basic profiles positioned in the lower to mid-price range, while ash, oak, knot-free grades, exterior cladding, decking and precision sauna profiles commanded higher prices.

The global thermally modified wood market is benefiting from sustainable building material substitution, upgrading of outdoor living spaces, wider adoption of timber-based construction and rising demand for natural-looking materials in premium residential and commercial interiors. Compared with conventional chemically pressure-treated wood, thermally modified wood does not rely on heavy-metal or aggressive preservative systems, while retaining a natural solid-wood texture and improving dimensional stability, weather resistance and moisture performance. This supports its adoption in exterior cladding, decking, landscape applications, saunas and high-end interior decoration. Europe continues to lead in process maturity, certification systems, architectural adoption and brand recognition, while North America is supported by residential renovation, outdoor wood applications and expansion of local thermal modification capacity. China, Japan and South Korea are increasingly driven by commercial spaces, hospitality projects, landscaping, sauna applications and boutique residential decoration.

Key market challenges include raw timber price volatility, rising energy costs, yield control during heat treatment, species-specific performance differences and end-user confusion between thermally modified wood, carbonized wood and pressure-treated wood. Thermal treatment improves decay resistance and dimensional stability, but it may also reduce toughness, increase cracking risk, complicate color consistency control and require stricter installation practices. As a result, leading suppliers need stable capabilities in heat-treatment equipment, drying schedules, product grading, profile machining and surface finishing. Future downstream demand is expected to expand from decking and sauna materials toward architectural facades, modular timber buildings, low-maintenance landscape systems, urban renewal projects, resort and hospitality projects and premium home decoration. Industry competition will increasingly shift from price-based competition to integrated performance based on certification systems, supply reliability, design compatibility and long-term durability.

This report studies the global Thermal Treatment Modified Wood production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Thermal Treatment Modified Wood 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 Thermal Treatment Modified Wood that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Thermal Treatment Modified Wood total production and demand, 2021-2032, (Cubic Meter)

Global Thermal Treatment Modified Wood total production value, 2021-2032, (USD Million)

Global Thermal Treatment Modified Wood production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Cubic Meter), (based on production site)

Global Thermal Treatment Modified Wood consumption by region & country, CAGR, 2021-2032 & (Cubic Meter)

U.S. VS China: Thermal Treatment Modified Wood domestic production, consumption, key domestic manufacturers and share

Global Thermal Treatment Modified Wood production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Cubic Meter)

Global Thermal Treatment Modified Wood production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Cubic Meter)

Global Thermal Treatment Modified Wood production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Cubic Meter)

This report profiles key players in the global Thermal Treatment Modified Wood 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 Thermory AS, Oy Lunawood Ltd, Stora Enso Oyj, Oy SWM-Wood Ltd, HJT-Holz Oy, Sahakuutio Oy, HeatWood AB, Fr?slev Tr? A/S, LDCwood, Sawmill Stefan W?oszakowice, 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 Thermal Treatment Modified Wood 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 Thermal Treatment Modified Wood Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Thermal Treatment Modified Wood Market, Segmentation by Type:

Steam Heat Treatment

Vacuum Thermal Modification

Nitrogen and Inert Gas Treatment

Others

Global Thermal Treatment Modified Wood Market, Segmentation by Wood Species:

Pine

Spruce

Ash and Other Hardwoods

Others

Global Thermal Treatment Modified Wood Market, Segmentation by Modification Class:

Durability Grade Products

Stability Grade Products

Custom Grade Products

Global Thermal Treatment Modified Wood Market, Segmentation by Dimension Specification:

Thin Panels below 20 mm

Standard Boards 20 mm to 32 mm

Heavy Boards above 32 mm

Global Thermal Treatment Modified Wood Market, Segmentation by Application:

Residential Construction and Renovation

Commercial and Hospitality Projects

Landscape and Outdoor Facilities

Others

Companies Profiled:

Thermory AS

Oy Lunawood Ltd

Stora Enso Oyj

Oy SWM-Wood Ltd

HJT-Holz Oy

Sahakuutio Oy

HeatWood AB

Frøslev Trø A/S

LDCwood

Sawmill Stefan Włoszakowice

Novawood

Tantimber

Haşep Entegre Orman İşletmeleri San. Tic. A.Ş.

NASwood

Koshii & Co., Ltd.

Arbor Wood Co.

Delta Millworks

Bingaman Lumber Inc.

ThermalWood Canada Inc.

Scottywood Corporation

Abodo Wood Ltd

Imbue Wood Sdn. Bhd.

Maran Timber Sdn. Bhd.

Fujian Qin Chao Timber Technology Co., Ltd.

Dongguan City Hi Song Wood Co., Ltd.

Key Questions Answered:

1. How big is the global Thermal Treatment Modified Wood market?
2. What is the demand of the global Thermal Treatment Modified Wood market?
3. What is the year over year growth of the global Thermal Treatment Modified Wood market?
4. What is the production and production value of the global Thermal Treatment Modified Wood market?
5. Who are the key producers in the global Thermal Treatment Modified Wood market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Thermal Treatment Modified Wood Introduction
- 1.2 World Thermal Treatment Modified Wood Supply & Forecast
 - 1.2.1 World Thermal Treatment Modified Wood Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Thermal Treatment Modified Wood Production (2021-2032)
 - 1.2.3 World Thermal Treatment Modified Wood Pricing Trends (2021-2032)
- 1.3 World Thermal Treatment Modified Wood Production by Region (Based on Production Site)
 - 1.3.1 World Thermal Treatment Modified Wood Production Value by Region (2021-2032)
 - 1.3.2 World Thermal Treatment Modified Wood Production by Region (2021-2032)
 - 1.3.3 World Thermal Treatment Modified Wood Average Price by Region (2021-2032)
 - 1.3.4 North America Thermal Treatment Modified Wood Production (2021-2032)
 - 1.3.5 Europe Thermal Treatment Modified Wood Production (2021-2032)
 - 1.3.6 China Thermal Treatment Modified Wood Production (2021-2032)
 - 1.3.7 Japan Thermal Treatment Modified Wood Production (2021-2032)
 - 1.3.8 Southeast Asia Thermal Treatment Modified Wood Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Thermal Treatment Modified Wood Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Thermal Treatment Modified Wood Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Thermal Treatment Modified Wood Demand (2021-2032)
- 2.2 World Thermal Treatment Modified Wood Consumption by Region
 - 2.2.1 World Thermal Treatment Modified Wood Consumption by Region (2021-2026)
 - 2.2.2 World Thermal Treatment Modified Wood Consumption Forecast by Region (2027-2032)
- 2.3 United States Thermal Treatment Modified Wood Consumption (2021-2032)
- 2.4 China Thermal Treatment Modified Wood Consumption (2021-2032)
- 2.5 Europe Thermal Treatment Modified Wood Consumption (2021-2032)
- 2.6 Japan Thermal Treatment Modified Wood Consumption (2021-2032)
- 2.7 South Korea Thermal Treatment Modified Wood Consumption (2021-2032)
- 2.8 ASEAN Thermal Treatment Modified Wood Consumption (2021-2032)

2.9 India Thermal Treatment Modified Wood Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Thermal Treatment Modified Wood Production Value by Manufacturer (2021-2026)

3.2 World Thermal Treatment Modified Wood Production by Manufacturer (2021-2026)

3.3 World Thermal Treatment Modified Wood Average Price by Manufacturer (2021-2026)

3.4 Thermal Treatment Modified Wood Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Thermal Treatment Modified Wood Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Thermal Treatment Modified Wood in 2025

3.5.3 Global Concentration Ratios (CR8) for Thermal Treatment Modified Wood in 2025

3.6 Thermal Treatment Modified Wood Market: Overall Company Footprint Analysis

3.6.1 Thermal Treatment Modified Wood Market: Region Footprint

3.6.2 Thermal Treatment Modified Wood Market: Company Product Type Footprint

3.6.3 Thermal Treatment Modified Wood Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Thermal Treatment Modified Wood Production Value Comparison

4.1.1 United States VS China: Thermal Treatment Modified Wood Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Thermal Treatment Modified Wood Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Thermal Treatment Modified Wood Production Comparison

4.2.1 United States VS China: Thermal Treatment Modified Wood Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Thermal Treatment Modified Wood Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Thermal Treatment Modified Wood Consumption Comparison

4.3.1 United States VS China: Thermal Treatment Modified Wood Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Thermal Treatment Modified Wood Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Thermal Treatment Modified Wood Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Thermal Treatment Modified Wood Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Thermal Treatment Modified Wood Production Value (2021-2026)

4.4.3 United States Based Manufacturers Thermal Treatment Modified Wood Production (2021-2026)

4.5 China Based Thermal Treatment Modified Wood Manufacturers and Market Share

4.5.1 China Based Thermal Treatment Modified Wood Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Thermal Treatment Modified Wood Production Value (2021-2026)

4.5.3 China Based Manufacturers Thermal Treatment Modified Wood Production (2021-2026)

4.6 Rest of World Based Thermal Treatment Modified Wood Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Thermal Treatment Modified Wood Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Thermal Treatment Modified Wood Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Thermal Treatment Modified Wood Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Thermal Treatment Modified Wood Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Steam Heat Treatment

5.2.2 Vacuum Thermal Modification

5.2.3 Nitrogen and Inert Gas Treatment

5.2.4 Others

5.3 Market Segment by Type

5.3.1 World Thermal Treatment Modified Wood Production by Type (2021-2032)

5.3.2 World Thermal Treatment Modified Wood Production Value by Type (2021-2032)

5.3.3 World Thermal Treatment Modified Wood Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY WOOD SPECIES

6.1 World Thermal Treatment Modified Wood Market Size Overview by Wood Species:
2021 VS 2025 VS 2032

6.2 Segment Introduction by Wood Species

6.2.1 Pine

6.2.2 Spruce

6.2.3 Ash and Other Hardwoods

6.2.4 Others

6.3 Market Segment by Wood Species

6.3.1 World Thermal Treatment Modified Wood Production by Wood Species
(2021-2032)

6.3.2 World Thermal Treatment Modified Wood Production Value by Wood Species
(2021-2032)

6.3.3 World Thermal Treatment Modified Wood Average Price by Wood Species
(2021-2032)

7 MARKET ANALYSIS BY MODIFICATION CLASS

7.1 World Thermal Treatment Modified Wood Market Size Overview by Modification
Class: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Modification Class

7.2.1 Durability Grade Products

7.2.2 Stability Grade Products

7.2.3 Custom Grade Products

7.3 Market Segment by Modification Class

7.3.1 World Thermal Treatment Modified Wood Production by Modification Class
(2021-2032)

7.3.2 World Thermal Treatment Modified Wood Production Value by Modification
Class (2021-2032)

7.3.3 World Thermal Treatment Modified Wood Average Price by Modification Class
(2021-2032)

8 MARKET ANALYSIS BY DIMENSION SPECIFICATION

8.1 World Thermal Treatment Modified Wood Market Size Overview by Dimension Specification: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Dimension Specification

8.2.1 Thin Panels below 20 mm

8.2.2 Standard Boards 20 mm to 32 mm

8.2.3 Heavy Boards above 32 mm

8.3 Market Segment by Dimension Specification

8.3.1 World Thermal Treatment Modified Wood Production by Dimension Specification (2021-2032)

8.3.2 World Thermal Treatment Modified Wood Production Value by Dimension Specification (2021-2032)

8.3.3 World Thermal Treatment Modified Wood Average Price by Dimension Specification (2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World Thermal Treatment Modified Wood Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Residential Construction and Renovation

9.2.2 Commercial and Hospitality Projects

9.2.3 Landscape and Outdoor Facilities

9.2.4 Others

9.3 Market Segment by Application

9.3.1 World Thermal Treatment Modified Wood Production by Application (2021-2032)

9.3.2 World Thermal Treatment Modified Wood Production Value by Application (2021-2032)

9.3.3 World Thermal Treatment Modified Wood Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Thermory AS

10.1.1 Thermory AS Details

10.1.2 Thermory AS Major Business

10.1.3 Thermory AS Thermal Treatment Modified Wood Product and Services

10.1.4 Thermory AS Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.1.5 Thermory AS Recent Developments/Updates

10.1.6 Thermory AS Competitive Strengths & Weaknesses

10.2 Oy Lunawood Ltd

10.2.1 Oy Lunawood Ltd Details

10.2.2 Oy Lunawood Ltd Major Business

10.2.3 Oy Lunawood Ltd Thermal Treatment Modified Wood Product and Services

10.2.4 Oy Lunawood Ltd Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.2.5 Oy Lunawood Ltd Recent Developments/Updates

10.2.6 Oy Lunawood Ltd Competitive Strengths & Weaknesses

10.3 Stora Enso Oyj

10.3.1 Stora Enso Oyj Details

10.3.2 Stora Enso Oyj Major Business

10.3.3 Stora Enso Oyj Thermal Treatment Modified Wood Product and Services

10.3.4 Stora Enso Oyj Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.3.5 Stora Enso Oyj Recent Developments/Updates

10.3.6 Stora Enso Oyj Competitive Strengths & Weaknesses

10.4 Oy SWM-Wood Ltd

10.4.1 Oy SWM-Wood Ltd Details

10.4.2 Oy SWM-Wood Ltd Major Business

10.4.3 Oy SWM-Wood Ltd Thermal Treatment Modified Wood Product and Services

10.4.4 Oy SWM-Wood Ltd Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.4.5 Oy SWM-Wood Ltd Recent Developments/Updates

10.4.6 Oy SWM-Wood Ltd Competitive Strengths & Weaknesses

10.5 HJT-Holz Oy

10.5.1 HJT-Holz Oy Details

10.5.2 HJT-Holz Oy Major Business

10.5.3 HJT-Holz Oy Thermal Treatment Modified Wood Product and Services

10.5.4 HJT-Holz Oy Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.5.5 HJT-Holz Oy Recent Developments/Updates

10.5.6 HJT-Holz Oy Competitive Strengths & Weaknesses

10.6 Sahakuutio Oy

10.6.1 Sahakuutio Oy Details

10.6.2 Sahakuutio Oy Major Business

- 10.6.3 Sahakuutio Oy Thermal Treatment Modified Wood Product and Services
- 10.6.4 Sahakuutio Oy Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.6.5 Sahakuutio Oy Recent Developments/Updates
- 10.6.6 Sahakuutio Oy Competitive Strengths & Weaknesses
- 10.7 HeatWood AB
 - 10.7.1 HeatWood AB Details
 - 10.7.2 HeatWood AB Major Business
 - 10.7.3 HeatWood AB Thermal Treatment Modified Wood Product and Services
 - 10.7.4 HeatWood AB Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.7.5 HeatWood AB Recent Developments/Updates
 - 10.7.6 HeatWood AB Competitive Strengths & Weaknesses
- 10.8 Fr?slev Tr? A/S
 - 10.8.1 Fr?slev Tr? A/S Details
 - 10.8.2 Fr?slev Tr? A/S Major Business
 - 10.8.3 Fr?slev Tr? A/S Thermal Treatment Modified Wood Product and Services
 - 10.8.4 Fr?slev Tr? A/S Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.8.5 Fr?slev Tr? A/S Recent Developments/Updates
 - 10.8.6 Fr?slev Tr? A/S Competitive Strengths & Weaknesses
- 10.9 LDCwood
 - 10.9.1 LDCwood Details
 - 10.9.2 LDCwood Major Business
 - 10.9.3 LDCwood Thermal Treatment Modified Wood Product and Services
 - 10.9.4 LDCwood Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.9.5 LDCwood Recent Developments/Updates
 - 10.9.6 LDCwood Competitive Strengths & Weaknesses
- 10.10 Sawmill Stefan W?oszakowice
 - 10.10.1 Sawmill Stefan W?oszakowice Details
 - 10.10.2 Sawmill Stefan W?oszakowice Major Business
 - 10.10.3 Sawmill Stefan W?oszakowice Thermal Treatment Modified Wood Product and Services
 - 10.10.4 Sawmill Stefan W?oszakowice Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.10.5 Sawmill Stefan W?oszakowice Recent Developments/Updates
 - 10.10.6 Sawmill Stefan W?oszakowice Competitive Strengths & Weaknesses
- 10.11 Novawood

- 10.11.1 Novawood Details
- 10.11.2 Novawood Major Business
- 10.11.3 Novawood Thermal Treatment Modified Wood Product and Services
- 10.11.4 Novawood Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.11.5 Novawood Recent Developments/Updates
- 10.11.6 Novawood Competitive Strengths & Weaknesses
- 10.12 Tantimber
 - 10.12.1 Tantimber Details
 - 10.12.2 Tantimber Major Business
 - 10.12.3 Tantimber Thermal Treatment Modified Wood Product and Services
 - 10.12.4 Tantimber Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.12.5 Tantimber Recent Developments/Updates
 - 10.12.6 Tantimber Competitive Strengths & Weaknesses
- 10.13 Ha?ep Entegre Orman ?r?nleri San. Tic. A.?.
 - 10.13.1 Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Details
 - 10.13.2 Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Major Business
 - 10.13.3 Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Thermal Treatment Modified Wood Product and Services
 - 10.13.4 Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.13.5 Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Recent Developments/Updates
 - 10.13.6 Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Competitive Strengths & Weaknesses
- 10.14 NASwood
 - 10.14.1 NASwood Details
 - 10.14.2 NASwood Major Business
 - 10.14.3 NASwood Thermal Treatment Modified Wood Product and Services
 - 10.14.4 NASwood Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.14.5 NASwood Recent Developments/Updates
 - 10.14.6 NASwood Competitive Strengths & Weaknesses
- 10.15 Koshii & Co., Ltd.
 - 10.15.1 Koshii & Co., Ltd. Details
 - 10.15.2 Koshii & Co., Ltd. Major Business
 - 10.15.3 Koshii & Co., Ltd. Thermal Treatment Modified Wood Product and Services
 - 10.15.4 Koshii & Co., Ltd. Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 10.15.5 Koshii & Co., Ltd. Recent Developments/Updates
- 10.15.6 Koshii & Co., Ltd. Competitive Strengths & Weaknesses
- 10.16 Arbor Wood Co.
 - 10.16.1 Arbor Wood Co. Details
 - 10.16.2 Arbor Wood Co. Major Business
 - 10.16.3 Arbor Wood Co. Thermal Treatment Modified Wood Product and Services
 - 10.16.4 Arbor Wood Co. Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.16.5 Arbor Wood Co. Recent Developments/Updates
 - 10.16.6 Arbor Wood Co. Competitive Strengths & Weaknesses
- 10.17 Delta Millworks
 - 10.17.1 Delta Millworks Details
 - 10.17.2 Delta Millworks Major Business
 - 10.17.3 Delta Millworks Thermal Treatment Modified Wood Product and Services
 - 10.17.4 Delta Millworks Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.17.5 Delta Millworks Recent Developments/Updates
 - 10.17.6 Delta Millworks Competitive Strengths & Weaknesses
- 10.18 Bingaman Lumber Inc.
 - 10.18.1 Bingaman Lumber Inc. Details
 - 10.18.2 Bingaman Lumber Inc. Major Business
 - 10.18.3 Bingaman Lumber Inc. Thermal Treatment Modified Wood Product and Services
 - 10.18.4 Bingaman Lumber Inc. Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.18.5 Bingaman Lumber Inc. Recent Developments/Updates
 - 10.18.6 Bingaman Lumber Inc. Competitive Strengths & Weaknesses
- 10.19 ThermalWood Canada Inc.
 - 10.19.1 ThermalWood Canada Inc. Details
 - 10.19.2 ThermalWood Canada Inc. Major Business
 - 10.19.3 ThermalWood Canada Inc. Thermal Treatment Modified Wood Product and Services
 - 10.19.4 ThermalWood Canada Inc. Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.19.5 ThermalWood Canada Inc. Recent Developments/Updates
 - 10.19.6 ThermalWood Canada Inc. Competitive Strengths & Weaknesses
- 10.20 Scottywood Corporation
 - 10.20.1 Scottywood Corporation Details
 - 10.20.2 Scottywood Corporation Major Business

10.20.3 Scottywood Corporation Thermal Treatment Modified Wood Product and Services

10.20.4 Scottywood Corporation Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.20.5 Scottywood Corporation Recent Developments/Updates

10.20.6 Scottywood Corporation Competitive Strengths & Weaknesses

10.21 Abodo Wood Ltd

10.21.1 Abodo Wood Ltd Details

10.21.2 Abodo Wood Ltd Major Business

10.21.3 Abodo Wood Ltd Thermal Treatment Modified Wood Product and Services

10.21.4 Abodo Wood Ltd Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.21.5 Abodo Wood Ltd Recent Developments/Updates

10.21.6 Abodo Wood Ltd Competitive Strengths & Weaknesses

10.22 Imbue Wood Sdn. Bhd.

10.22.1 Imbue Wood Sdn. Bhd. Details

10.22.2 Imbue Wood Sdn. Bhd. Major Business

10.22.3 Imbue Wood Sdn. Bhd. Thermal Treatment Modified Wood Product and Services

10.22.4 Imbue Wood Sdn. Bhd. Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.22.5 Imbue Wood Sdn. Bhd. Recent Developments/Updates

10.22.6 Imbue Wood Sdn. Bhd. Competitive Strengths & Weaknesses

10.23 Maran Timber Sdn. Bhd.

10.23.1 Maran Timber Sdn. Bhd. Details

10.23.2 Maran Timber Sdn. Bhd. Major Business

10.23.3 Maran Timber Sdn. Bhd. Thermal Treatment Modified Wood Product and Services

10.23.4 Maran Timber Sdn. Bhd. Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.23.5 Maran Timber Sdn. Bhd. Recent Developments/Updates

10.23.6 Maran Timber Sdn. Bhd. Competitive Strengths & Weaknesses

10.24 Fujian Qin Chao Timber Technology Co., Ltd.

10.24.1 Fujian Qin Chao Timber Technology Co., Ltd. Details

10.24.2 Fujian Qin Chao Timber Technology Co., Ltd. Major Business

10.24.3 Fujian Qin Chao Timber Technology Co., Ltd. Thermal Treatment Modified Wood Product and Services

10.24.4 Fujian Qin Chao Timber Technology Co., Ltd. Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 10.24.5 Fujian Qin Chao Timber Technology Co., Ltd. Recent Developments/Updates
- 10.24.6 Fujian Qin Chao Timber Technology Co., Ltd. Competitive Strengths & Weaknesses
- 10.25 Dongguan City Hi Song Wood Co., Ltd.
 - 10.25.1 Dongguan City Hi Song Wood Co., Ltd. Details
 - 10.25.2 Dongguan City Hi Song Wood Co., Ltd. Major Business
 - 10.25.3 Dongguan City Hi Song Wood Co., Ltd. Thermal Treatment Modified Wood Product and Services
 - 10.25.4 Dongguan City Hi Song Wood Co., Ltd. Thermal Treatment Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.25.5 Dongguan City Hi Song Wood Co., Ltd. Recent Developments/Updates
 - 10.25.6 Dongguan City Hi Song Wood Co., Ltd. Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

- 11.1 Thermal Treatment Modified Wood Industry Chain
- 11.2 Thermal Treatment Modified Wood Upstream Analysis
 - 11.2.1 Thermal Treatment Modified Wood Core Raw Materials
 - 11.2.2 Main Manufacturers of Thermal Treatment Modified Wood Core Raw Materials
- 11.3 Midstream Analysis
- 11.4 Downstream Analysis
- 11.5 Thermal Treatment Modified Wood Production Mode
- 11.6 Thermal Treatment Modified Wood Procurement Model
- 11.7 Thermal Treatment Modified Wood Industry Sales Model and Sales Channels
 - 11.7.1 Thermal Treatment Modified Wood Sales Model
 - 11.7.2 Thermal Treatment Modified Wood Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

- 13.1 Methodology
- 13.2 Research Process and Data Source
- 13.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Thermal Treatment Modified Wood Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Thermal Treatment Modified Wood Production Value by Region (2021-2026) & (USD Million)

Table 3. World Thermal Treatment Modified Wood Production Value by Region (2027-2032) & (USD Million)

Table 4. World Thermal Treatment Modified Wood Production Value Market Share by Region (2021-2026)

Table 5. World Thermal Treatment Modified Wood Production Value Market Share by Region (2027-2032)

Table 6. World Thermal Treatment Modified Wood Production by Region (2021-2026) & (Cubic Meter)

Table 7. World Thermal Treatment Modified Wood Production by Region (2027-2032) & (Cubic Meter)

Table 8. World Thermal Treatment Modified Wood Production Market Share by Region (2021-2026)

Table 9. World Thermal Treatment Modified Wood Production Market Share by Region (2027-2032)

Table 10. World Thermal Treatment Modified Wood Average Price by Region (2021-2026) & (US\$/Cubic Meter)

Table 11. World Thermal Treatment Modified Wood Average Price by Region (2027-2032) & (US\$/Cubic Meter)

Table 12. Thermal Treatment Modified Wood Major Market Trends

Table 13. World Thermal Treatment Modified Wood Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Cubic Meter)

Table 14. World Thermal Treatment Modified Wood Consumption by Region (2021-2026) & (Cubic Meter)

Table 15. World Thermal Treatment Modified Wood Consumption Forecast by Region (2027-2032) & (Cubic Meter)

Table 16. World Thermal Treatment Modified Wood Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Thermal Treatment Modified Wood Producers in 2025

Table 18. World Thermal Treatment Modified Wood Production by Manufacturer (2021-2026) & (Cubic Meter)

Table 19. Production Market Share of Key Thermal Treatment Modified Wood Producers in 2025

Table 20. World Thermal Treatment Modified Wood Average Price by Manufacturer (2021-2026) & (US\$/Cubic Meter)

Table 21. Global Thermal Treatment Modified Wood Company Evaluation Quadrant

Table 22. World Thermal Treatment Modified Wood Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Thermal Treatment Modified Wood Production Site of Key Manufacturer

Table 24. Thermal Treatment Modified Wood Market: Company Product Type Footprint

Table 25. Thermal Treatment Modified Wood Market: Company Product Application Footprint

Table 26. Thermal Treatment Modified Wood Competitive Factors

Table 27. Thermal Treatment Modified Wood New Entrant and Capacity Expansion Plans

Table 28. Thermal Treatment Modified Wood Mergers & Acquisitions Activity

Table 29. United States VS China Thermal Treatment Modified Wood Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Thermal Treatment Modified Wood Production Comparison, (2021 & 2025 & 2032) & (Cubic Meter)

Table 31. United States VS China Thermal Treatment Modified Wood Consumption Comparison, (2021 & 2025 & 2032) & (Cubic Meter)

Table 32. United States Based Thermal Treatment Modified Wood Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Thermal Treatment Modified Wood Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Thermal Treatment Modified Wood Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Thermal Treatment Modified Wood Production (2021-2026) & (Cubic Meter)

Table 36. United States Based Manufacturers Thermal Treatment Modified Wood Production Market Share (2021-2026)

Table 37. China Based Thermal Treatment Modified Wood Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Thermal Treatment Modified Wood Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Thermal Treatment Modified Wood Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Thermal Treatment Modified Wood Production,

(2021-2026) & (Cubic Meter)

Table 41. China Based Manufacturers Thermal Treatment Modified Wood Production Market Share (2021-2026)

Table 42. Rest of World Based Thermal Treatment Modified Wood Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Thermal Treatment Modified Wood Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Thermal Treatment Modified Wood Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Thermal Treatment Modified Wood Production, (2021-2026) & (Cubic Meter)

Table 46. Rest of World Based Manufacturers Thermal Treatment Modified Wood Production Market Share (2021-2026)

Table 47. World Thermal Treatment Modified Wood Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Thermal Treatment Modified Wood Production by Type (2021-2026) & (Cubic Meter)

Table 49. World Thermal Treatment Modified Wood Production by Type (2027-2032) & (Cubic Meter)

Table 50. World Thermal Treatment Modified Wood Production Value by Type (2021-2026) & (USD Million)

Table 51. World Thermal Treatment Modified Wood Production Value by Type (2027-2032) & (USD Million)

Table 52. World Thermal Treatment Modified Wood Average Price by Type (2021-2026) & (US\$/Cubic Meter)

Table 53. World Thermal Treatment Modified Wood Average Price by Type (2027-2032) & (US\$/Cubic Meter)

Table 54. World Thermal Treatment Modified Wood Production Value by Wood Species, (USD Million), 2021 & 2025 & 2032

Table 55. World Thermal Treatment Modified Wood Production by Wood Species (2021-2026) & (Cubic Meter)

Table 56. World Thermal Treatment Modified Wood Production by Wood Species (2027-2032) & (Cubic Meter)

Table 57. World Thermal Treatment Modified Wood Production Value by Wood Species (2021-2026) & (USD Million)

Table 58. World Thermal Treatment Modified Wood Production Value by Wood Species (2027-2032) & (USD Million)

Table 59. World Thermal Treatment Modified Wood Average Price by Wood Species (2021-2026) & (US\$/Cubic Meter)

Table 60. World Thermal Treatment Modified Wood Average Price by Wood Species (2027-2032) & (US\$/Cubic Meter)

Table 61. World Thermal Treatment Modified Wood Production Value by Modification Class, (USD Million), 2021 & 2025 & 2032

Table 62. World Thermal Treatment Modified Wood Production by Modification Class (2021-2026) & (Cubic Meter)

Table 63. World Thermal Treatment Modified Wood Production by Modification Class (2027-2032) & (Cubic Meter)

Table 64. World Thermal Treatment Modified Wood Production Value by Modification Class (2021-2026) & (USD Million)

Table 65. World Thermal Treatment Modified Wood Production Value by Modification Class (2027-2032) & (USD Million)

Table 66. World Thermal Treatment Modified Wood Average Price by Modification Class (2021-2026) & (US\$/Cubic Meter)

Table 67. World Thermal Treatment Modified Wood Average Price by Modification Class (2027-2032) & (US\$/Cubic Meter)

Table 68. World Thermal Treatment Modified Wood Production Value by Dimension Specification, (USD Million), 2021 & 2025 & 2032

Table 69. World Thermal Treatment Modified Wood Production by Dimension Specification (2021-2026) & (Cubic Meter)

Table 70. World Thermal Treatment Modified Wood Production by Dimension Specification (2027-2032) & (Cubic Meter)

Table 71. World Thermal Treatment Modified Wood Production Value by Dimension Specification (2021-2026) & (USD Million)

Table 72. World Thermal Treatment Modified Wood Production Value by Dimension Specification (2027-2032) & (USD Million)

Table 73. World Thermal Treatment Modified Wood Average Price by Dimension Specification (2021-2026) & (US\$/Cubic Meter)

Table 74. World Thermal Treatment Modified Wood Average Price by Dimension Specification (2027-2032) & (US\$/Cubic Meter)

Table 75. World Thermal Treatment Modified Wood Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World Thermal Treatment Modified Wood Production by Application (2021-2026) & (Cubic Meter)

Table 77. World Thermal Treatment Modified Wood Production by Application (2027-2032) & (Cubic Meter)

Table 78. World Thermal Treatment Modified Wood Production Value by Application (2021-2026) & (USD Million)

Table 79. World Thermal Treatment Modified Wood Production Value by Application

(2027-2032) & (USD Million)

Table 80. World Thermal Treatment Modified Wood Average Price by Application (2021-2026) & (US\$/Cubic Meter)

Table 81. World Thermal Treatment Modified Wood Average Price by Application (2027-2032) & (US\$/Cubic Meter)

Table 82. Thermory AS Basic Information, Manufacturing Base and Competitors

Table 83. Thermory AS Major Business

Table 84. Thermory AS Thermal Treatment Modified Wood Product and Services

Table 85. Thermory AS Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Thermory AS Recent Developments/Updates

Table 87. Thermory AS Competitive Strengths & Weaknesses

Table 88. Oy Lunawood Ltd Basic Information, Manufacturing Base and Competitors

Table 89. Oy Lunawood Ltd Major Business

Table 90. Oy Lunawood Ltd Thermal Treatment Modified Wood Product and Services

Table 91. Oy Lunawood Ltd Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. Oy Lunawood Ltd Recent Developments/Updates

Table 93. Oy Lunawood Ltd Competitive Strengths & Weaknesses

Table 94. Stora Enso Oyj Basic Information, Manufacturing Base and Competitors

Table 95. Stora Enso Oyj Major Business

Table 96. Stora Enso Oyj Thermal Treatment Modified Wood Product and Services

Table 97. Stora Enso Oyj Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. Stora Enso Oyj Recent Developments/Updates

Table 99. Stora Enso Oyj Competitive Strengths & Weaknesses

Table 100. Oy SWM-Wood Ltd Basic Information, Manufacturing Base and Competitors

Table 101. Oy SWM-Wood Ltd Major Business

Table 102. Oy SWM-Wood Ltd Thermal Treatment Modified Wood Product and Services

Table 103. Oy SWM-Wood Ltd Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Oy SWM-Wood Ltd Recent Developments/Updates

Table 105. Oy SWM-Wood Ltd Competitive Strengths & Weaknesses

Table 106. HJT-Holz Oy Basic Information, Manufacturing Base and Competitors

Table 107. HJT-Holz Oy Major Business

Table 108. HJT-Holz Oy Thermal Treatment Modified Wood Product and Services

Table 109. HJT-Holz Oy Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. HJT-Holz Oy Recent Developments/Updates

Table 111. HJT-Holz Oy Competitive Strengths & Weaknesses

Table 112. Sahakuutio Oy Basic Information, Manufacturing Base and Competitors

Table 113. Sahakuutio Oy Major Business

Table 114. Sahakuutio Oy Thermal Treatment Modified Wood Product and Services

Table 115. Sahakuutio Oy Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. Sahakuutio Oy Recent Developments/Updates

Table 117. Sahakuutio Oy Competitive Strengths & Weaknesses

Table 118. HeatWood AB Basic Information, Manufacturing Base and Competitors

Table 119. HeatWood AB Major Business

Table 120. HeatWood AB Thermal Treatment Modified Wood Product and Services

Table 121. HeatWood AB Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. HeatWood AB Recent Developments/Updates

Table 123. HeatWood AB Competitive Strengths & Weaknesses

Table 124. Fr?slev Tr? A/S Basic Information, Manufacturing Base and Competitors

Table 125. Fr?slev Tr? A/S Major Business

Table 126. Fr?slev Tr? A/S Thermal Treatment Modified Wood Product and Services

Table 127. Fr?slev Tr? A/S Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. Fr?slev Tr? A/S Recent Developments/Updates

Table 129. Fr?slev Tr? A/S Competitive Strengths & Weaknesses

Table 130. LDCwood Basic Information, Manufacturing Base and Competitors

Table 131. LDCwood Major Business

Table 132. LDCwood Thermal Treatment Modified Wood Product and Services

Table 133. LDCwood Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. LDCwood Recent Developments/Updates

Table 135. LDCwood Competitive Strengths & Weaknesses

Table 136. Sawmill Stefan W?oszakowice Basic Information, Manufacturing Base and Competitors

Table 137. Sawmill Stefan W?oszakowice Major Business

Table 138. Sawmill Stefan W?oszakowice Thermal Treatment Modified Wood Product and Services

Table 139. Sawmill Stefan W?oszakowice Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. Sawmill Stefan W?oszakowice Recent Developments/Updates

Table 141. Sawmill Stefan W?oszakowice Competitive Strengths & Weaknesses

Table 142. Novawood Basic Information, Manufacturing Base and Competitors

Table 143. Novawood Major Business

Table 144. Novawood Thermal Treatment Modified Wood Product and Services

Table 145. Novawood Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Novawood Recent Developments/Updates

Table 147. Novawood Competitive Strengths & Weaknesses

Table 148. Tantimber Basic Information, Manufacturing Base and Competitors

Table 149. Tantimber Major Business

Table 150. Tantimber Thermal Treatment Modified Wood Product and Services

Table 151. Tantimber Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. Tantimber Recent Developments/Updates

Table 153. Tantimber Competitive Strengths & Weaknesses

Table 154. Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Basic Information, Manufacturing Base and Competitors

Table 155. Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Major Business

Table 156. Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Thermal Treatment Modified Wood Product and Services

Table 157. Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Recent Developments/Updates

Table 159. Ha?ep Entegre Orman ?r?nleri San. Tic. A.?. Competitive Strengths & Weaknesses

Table 160. NASwood Basic Information, Manufacturing Base and Competitors

Table 161. NASwood Major Business

Table 162. NASwood Thermal Treatment Modified Wood Product and Services

Table 163. NASwood Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. NASwood Recent Developments/Updates

Table 165. NASwood Competitive Strengths & Weaknesses

Table 166. Koshii & Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 167. Koshii & Co., Ltd. Major Business

Table 168. Koshii & Co., Ltd. Thermal Treatment Modified Wood Product and Services

Table 169. Koshii & Co., Ltd. Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. Koshii & Co., Ltd. Recent Developments/Updates

Table 171. Koshii & Co., Ltd. Competitive Strengths & Weaknesses

Table 172. Arbor Wood Co. Basic Information, Manufacturing Base and Competitors

Table 173. Arbor Wood Co. Major Business

Table 174. Arbor Wood Co. Thermal Treatment Modified Wood Product and Services

Table 175. Arbor Wood Co. Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 176. Arbor Wood Co. Recent Developments/Updates

Table 177. Arbor Wood Co. Competitive Strengths & Weaknesses

Table 178. Delta Millworks Basic Information, Manufacturing Base and Competitors

Table 179. Delta Millworks Major Business

Table 180. Delta Millworks Thermal Treatment Modified Wood Product and Services

Table 181. Delta Millworks Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 182. Delta Millworks Recent Developments/Updates

Table 183. Delta Millworks Competitive Strengths & Weaknesses

Table 184. Bingaman Lumber Inc. Basic Information, Manufacturing Base and Competitors

Table 185. Bingaman Lumber Inc. Major Business

Table 186. Bingaman Lumber Inc. Thermal Treatment Modified Wood Product and Services

Table 187. Bingaman Lumber Inc. Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 188. Bingaman Lumber Inc. Recent Developments/Updates
Table 189. Bingaman Lumber Inc. Competitive Strengths & Weaknesses
Table 190. ThermalWood Canada Inc. Basic Information, Manufacturing Base and Competitors
Table 191. ThermalWood Canada Inc. Major Business
Table 192. ThermalWood Canada Inc. Thermal Treatment Modified Wood Product and Services
Table 193. ThermalWood Canada Inc. Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 194. ThermalWood Canada Inc. Recent Developments/Updates
Table 195. ThermalWood Canada Inc. Competitive Strengths & Weaknesses
Table 196. Scottywood Corporation Basic Information, Manufacturing Base and Competitors
Table 197. Scottywood Corporation Major Business
Table 198. Scottywood Corporation Thermal Treatment Modified Wood Product and Services
Table 199. Scottywood Corporation Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 200. Scottywood Corporation Recent Developments/Updates
Table 201. Scottywood Corporation Competitive Strengths & Weaknesses
Table 202. Abodo Wood Ltd Basic Information, Manufacturing Base and Competitors
Table 203. Abodo Wood Ltd Major Business
Table 204. Abodo Wood Ltd Thermal Treatment Modified Wood Product and Services
Table 205. Abodo Wood Ltd Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 206. Abodo Wood Ltd Recent Developments/Updates
Table 207. Abodo Wood Ltd Competitive Strengths & Weaknesses
Table 208. Imbue Wood Sdn. Bhd. Basic Information, Manufacturing Base and Competitors
Table 209. Imbue Wood Sdn. Bhd. Major Business
Table 210. Imbue Wood Sdn. Bhd. Thermal Treatment Modified Wood Product and Services
Table 211. Imbue Wood Sdn. Bhd. Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 212. Imbue Wood Sdn. Bhd. Recent Developments/Updates

Table 213. Imbue Wood Sdn. Bhd. Competitive Strengths & Weaknesses
Table 214. Maran Timber Sdn. Bhd. Basic Information, Manufacturing Base and Competitors
Table 215. Maran Timber Sdn. Bhd. Major Business
Table 216. Maran Timber Sdn. Bhd. Thermal Treatment Modified Wood Product and Services
Table 217. Maran Timber Sdn. Bhd. Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 218. Maran Timber Sdn. Bhd. Recent Developments/Updates
Table 219. Maran Timber Sdn. Bhd. Competitive Strengths & Weaknesses
Table 220. Fujian Qin Chao Timber Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 221. Fujian Qin Chao Timber Technology Co., Ltd. Major Business
Table 222. Fujian Qin Chao Timber Technology Co., Ltd. Thermal Treatment Modified Wood Product and Services
Table 223. Fujian Qin Chao Timber Technology Co., Ltd. Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 224. Fujian Qin Chao Timber Technology Co., Ltd. Recent Developments/Updates
Table 225. Fujian Qin Chao Timber Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 226. Dongguan City Hi Song Wood Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 227. Dongguan City Hi Song Wood Co., Ltd. Major Business
Table 228. Dongguan City Hi Song Wood Co., Ltd. Thermal Treatment Modified Wood Product and Services
Table 229. Dongguan City Hi Song Wood Co., Ltd. Thermal Treatment Modified Wood Production (Cubic Meter), Price (US\$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 230. Dongguan City Hi Song Wood Co., Ltd. Recent Developments/Updates
Table 231. Dongguan City Hi Song Wood Co., Ltd. Competitive Strengths & Weaknesses
Table 232. Global Key Players of Thermal Treatment Modified Wood Upstream (Raw Materials)
Table 233. Global Thermal Treatment Modified Wood Typical Customers
Table 234. Thermal Treatment Modified Wood Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Thermal Treatment Modified Wood Picture

Figure 2. World Thermal Treatment Modified Wood Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Thermal Treatment Modified Wood Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Thermal Treatment Modified Wood Production (2021-2032) & (Cubic Meter)

Figure 5. World Thermal Treatment Modified Wood Average Price (2021-2032) & (US\$/Cubic Meter)

Figure 6. World Thermal Treatment Modified Wood Production Value Market Share by Region (2021-2032)

Figure 7. World Thermal Treatment Modified Wood Production Market Share by Region (2021-2032)

Figure 8. North America Thermal Treatment Modified Wood Production (2021-2032) & (Cubic Meter)

Figure 9. Europe Thermal Treatment Modified Wood Production (2021-2032) & (Cubic Meter)

Figure 10. China Thermal Treatment Modified Wood Production (2021-2032) & (Cubic Meter)

Figure 11. Japan Thermal Treatment Modified Wood Production (2021-2032) & (Cubic Meter)

Figure 12. Southeast Asia Thermal Treatment Modified Wood Production (2021-2032) & (Cubic Meter)

Figure 13. Thermal Treatment Modified Wood Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Thermal Treatment Modified Wood Consumption (2021-2032) & (Cubic Meter)

Figure 16. World Thermal Treatment Modified Wood Consumption Market Share by Region (2021-2032)

Figure 17. United States Thermal Treatment Modified Wood Consumption (2021-2032) & (Cubic Meter)

Figure 18. China Thermal Treatment Modified Wood Consumption (2021-2032) & (Cubic Meter)

Figure 19. Europe Thermal Treatment Modified Wood Consumption (2021-2032) & (Cubic Meter)

Figure 20. Japan Thermal Treatment Modified Wood Consumption (2021-2032) & (Cubic Meter)

Figure 21. South Korea Thermal Treatment Modified Wood Consumption (2021-2032) & (Cubic Meter)

Figure 22. ASEAN Thermal Treatment Modified Wood Consumption (2021-2032) & (Cubic Meter)

Figure 23. India Thermal Treatment Modified Wood Consumption (2021-2032) & (Cubic Meter)

Figure 24. Producer Shipments of Thermal Treatment Modified Wood by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Thermal Treatment Modified Wood Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Thermal Treatment Modified Wood Markets in 2025

Figure 27. United States VS China: Thermal Treatment Modified Wood Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Thermal Treatment Modified Wood Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Thermal Treatment Modified Wood Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Thermal Treatment Modified Wood Production Market Share 2025

Figure 31. China Based Manufacturers Thermal Treatment Modified Wood Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Thermal Treatment Modified Wood Production Market Share 2025

Figure 33. World Thermal Treatment Modified Wood Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World Thermal Treatment Modified Wood Production Value Market Share by Type in 2025

Figure 35. Steam Heat Treatment

Figure 36. Vacuum Thermal Modification

Figure 37. Nitrogen and Inert Gas Treatment

Figure 38. Others

Figure 39. World Thermal Treatment Modified Wood Production Market Share by Type (2021-2032)

Figure 40. World Thermal Treatment Modified Wood Production Value Market Share by Type (2021-2032)

Figure 41. World Thermal Treatment Modified Wood Average Price by Type

(2021-2032) & (US\$/Cubic Meter)

Figure 42. World Thermal Treatment Modified Wood Production Value by Wood Species, (USD Million), 2021 & 2025 & 2032

Figure 43. World Thermal Treatment Modified Wood Production Value Market Share by Wood Species in 2025

Figure 44. Pine

Figure 45. Spruce

Figure 46. Ash and Other Hardwoods

Figure 47. Others

Figure 48. World Thermal Treatment Modified Wood Production Market Share by Wood Species (2021-2032)

Figure 49. World Thermal Treatment Modified Wood Production Value Market Share by Wood Species (2021-2032)

Figure 50. World Thermal Treatment Modified Wood Average Price by Wood Species (2021-2032) & (US\$/Cubic Meter)

Figure 51. World Thermal Treatment Modified Wood Production Value by Modification Class, (USD Million), 2021 & 2025 & 2032

Figure 52. World Thermal Treatment Modified Wood Production Value Market Share by Modification Class in 2025

Figure 53. Durability Grade Products

Figure 54. Stability Grade Products

Figure 55. Custom Grade Products

Figure 56. World Thermal Treatment Modified Wood Production Market Share by Modification Class (2021-2032)

Figure 57. World Thermal Treatment Modified Wood Production Value Market Share by Modification Class (2021-2032)

Figure 58. World Thermal Treatment Modified Wood Average Price by Modification Class (2021-2032) & (US\$/Cubic Meter)

Figure 59. World Thermal Treatment Modified Wood Production Value by Dimension Specification, (USD Million), 2021 & 2025 & 2032

Figure 60. World Thermal Treatment Modified Wood Production Value Market Share by Dimension Specification in 2025

Figure 61. Thin Panels below 20 mm

Figure 62. Standard Boards 20 mm to 32 mm

Figure 63. Heavy Boards above 32 mm

Figure 64. World Thermal Treatment Modified Wood Production Market Share by Dimension Specification (2021-2032)

Figure 65. World Thermal Treatment Modified Wood Production Value Market Share by Dimension Specification (2021-2032)

Figure 66. World Thermal Treatment Modified Wood Average Price by Dimension Specification (2021-2032) & (US\$/Cubic Meter)

Figure 67. World Thermal Treatment Modified Wood Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 68. World Thermal Treatment Modified Wood Production Value Market Share by Application in 2025

Figure 69. Residential Construction and Renovation

Figure 70. Commercial and Hospitality Projects

Figure 71. Landscape and Outdoor Facilities

Figure 72. Others

Figure 73. World Thermal Treatment Modified Wood Production Market Share by Application (2021-2032)

Figure 74. World Thermal Treatment Modified Wood Production Value Market Share by Application (2021-2032)

Figure 75. World Thermal Treatment Modified Wood Average Price by Application (2021-2032) & (US\$/Cubic Meter)

Figure 76. Thermal Treatment Modified Wood Industry Chain

Figure 77. Thermal Treatment Modified Wood Procurement Model

Figure 78. Thermal Treatment Modified Wood Sales Model

Figure 79. Thermal Treatment Modified Wood Sales Channels, Direct Sales, and Distribution

Figure 80. Methodology

Figure 81. Research Process and Data Source

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