

Global Thermally-Modified Timber (TMT) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Thermally-Modified Timber (TMT) market size is expected to reach \$ 1018 million by 2032, rising at a market growth of 7.1% CAGR during the forecast period (2026-2032).

In 2025, global Thermally-Modified Timber (TMT) sales reached approximately 898 K Cubic Meters with an average global market price of around 680 USD per Cubic Meter.

Thermally-Modified Timber (TMT) refers to natural timber or sawn lumber that has been industrially upgraded through a controlled high-temperature process, typically using steam, low-oxygen conditions or inert media. The process permanently modifies the wood's chemical and physical structure, reducing moisture absorption, improving dimensional stability, enhancing decay resistance and creating a darker, more uniform appearance. The International ThermoWood Association describes ThermoWood as an industrial thermal modification process using elevated temperature and steam under atmospheric pressure without added chemicals, while North American references commonly describe treatment temperatures of around 180°-220°C. TMT is used in exterior cladding, decking, terraces, window and door components, saunas, interior panels, furniture and landscape structures.

Thermally-Modified Timber (TMT) is a medium-to-high value-added material driven by forest resources, thermal-processing know-how and building-material channels. Its gross margin is generally higher than that of commodity sawn timber and ordinary kiln-dried lumber, but lower than premium customized woodwork, branded outdoor systems and complex engineered wood products. Based on public disclosures from forest-product companies regarding wood costs, energy costs and construction-demand volatility, as well as the cost structure of dedicated kilns, long treatment cycles, grading

losses, profile processing and channel premiums, the overall gross margin of global TMT producers is estimated at around 22%–38%. Standard boards, blanks and OEM suppliers are usually closer to 18%–28%, while companies with brands, certifications, architect channels, stable supply and value-added processing capabilities may reach 30%–45%. Upstream inputs include logs, sawn timber, kiln-dried lumber, energy, steam systems, thermal kilns, grading equipment and moisture-control systems. The midstream stage covers thermal treatment, cooling and reconditioning, planing, profiling, finger-jointing, coating, packaging and testing. Downstream customers include building-material distributors, timber traders, facade contractors, landscape companies, window and door manufacturers, furniture makers, sauna producers and architectural projects. Profitability depends not only on heating, but also on timber grading, process consistency, outdoor durability validation, inventory turnover, profile development and regional channel strength.

Market Development Opportunities & Main Driving Factors

The growth opportunity for Thermally-Modified Timber (TMT) comes from the combined momentum of green buildings, renovation of existing building stock, outdoor-living upgrades and substitution demand for tropical hardwoods. The EU Renovation Wave aims to renovate around 35 million buildings by 2030 and at least double the annual rate of energy renovations, creating demand for facade renewal, envelope upgrades and low-carbon building materials. In parallel, European policy directions around bio-based construction materials, circular construction and the New European Bauhaus are improving the acceptance of renewable, low-carbon and scalable materials within the construction ecosystem. TMT does not rely on conventional preservatives, yet it improves the dimensional stability and outdoor suitability of ordinary softwoods, hardwoods and fast-growing species. This gives it strong substitution value in exterior cladding, decking, solar shading, battens and premium landscape timber. For producers, TMT can upgrade regional timber resources from commodity material sales into certified, design-oriented and project-based branded building products.

Market Challenges, Risks, & Restraints

The main challenges for TMT are cost volatility, performance boundaries and market education. Thermal modification requires dedicated kilns, energy input, steam control, long processing cycles and strict grading, so its unit cost is higher than ordinary kiln-dried lumber. When log, sawn timber, electricity, gas or logistics costs fluctuate, margins can be materially compressed. TMT improves dimensional stability, reduces moisture uptake and enhances decay resistance, but it should not be treated as a universal

material for every outdoor condition. Research from the U.S. Forest Products Laboratory indicates that more testing is still needed in severe decay environments and high-termite-pressure regions to define the boundaries of material performance. Thermal treatment may also affect strength, toughness, fastener holding and brittleness, so load-bearing uses, long-term water exposure, poor ventilation and extreme insect-risk environments require careful design based on species, treatment class, installation details and maintenance systems. On the market side, customers may confuse TMT with charred wood, preservative-treated lumber or stained decorative timber. Without standards, certifications and project references, producers may struggle to fully capture the price premium.

Downstream Demand Trends

Downstream demand for TMT is moving from simple board purchasing toward facade systems, outdoor-space systems and premium timber solutions. In residential markets, gardens, terraces, fences, outdoor kitchens, poolside decking and balcony upgrades are bringing TMT into mid-to-high-end home-improvement and landscape channels. In commercial buildings, hotels, offices, schools, cultural venues and public spaces increasingly value facade texture, low-carbon narratives and the experience of natural materials, supporting demand for thermally modified cladding, battens, shading elements and customized profiles. Interior applications such as saunas, wall panels, ceilings, furniture and acoustic decoration also create incremental demand because they value natural grain, low deformation and stable appearance. Future customers will focus more on life-cycle cost rather than initial purchase price alone, so brands with stable supply, product certification, installation guidelines, architect support, BIM resources and regional after-sales service will be better positioned. Regionally, Europe remains the most mature market; North America is moving from education to broader adoption; and Asia is supported by premium hotels, villas, commercial complexes and healthier interior-material trends. Overall, TMT is likely to evolve from a niche eco-friendly timber product into an important specialty material for green facades, outdoor living and premium wood design.

This report studies the global Thermally-Modified Timber (TMT) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Thermally-Modified Timber (TMT) 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 Thermally-Modified Timber

(TMT) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Thermally-Modified Timber (TMT) total production and demand, 2021-2032, (K Cubic Meters)

Global Thermally-Modified Timber (TMT) total production value, 2021-2032, (USD Million)

Global Thermally-Modified Timber (TMT) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Cubic Meters), (based on production site)

Global Thermally-Modified Timber (TMT) consumption by region & country, CAGR, 2021-2032 & (K Cubic Meters)

U.S. VS China: Thermally-Modified Timber (TMT) domestic production, consumption, key domestic manufacturers and share

Global Thermally-Modified Timber (TMT) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Cubic Meters)

Global Thermally-Modified Timber (TMT) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Cubic Meters)

Global Thermally-Modified Timber (TMT) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Cubic Meters)

This report profiles key players in the global Thermally-Modified Timber (TMT) 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 Arbor Wood, Lunawood, SWM-Wood, Stora Enso, Thermory, Cambia by NFP, Nordora, Novawood, Karava, Thermoarena, 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 Thermally-Modified Timber (TMT) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Cubic Meters) 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 Thermally-Modified Timber (TMT) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Thermally-Modified Timber (TMT) Market, Segmentation by Type:

Thermo-S

Thermo-D

Other

Global Thermally-Modified Timber (TMT) Market, Segmentation by Treatment Route:

Steam-based Thermal Modification

Oil Heat Treatment Modification

Nitrogen / Inert Gas Heat Treatment Modification

Hydrothermal / Wet Thermal Modification

Vacuum Thermal Modification

Others

Global Thermally-Modified Timber (TMT) Market, Segmentation by Wood Species:

Thermally Modified Softwood

Thermally Modified Hardwood

Thermally Modified Specialty Wood

Global Thermally-Modified Timber (TMT) Market, Segmentation by Product Form:

Thermally Modified Lumber / Sawn Timber

Thermally Modified Cladding

Thermally Modified Decking

Thermally Modified Panels / Interior Profiles

Thermally Modified Components

Global Thermally-Modified Timber (TMT) Market, Segmentation by Application:

Residential Buildings

Commercial Buildings

Outdoor Living / Landscaping

Others

Companies Profiled:

Arbor Wood

Lunawood

SWM-Wood

Stora Enso

Thermory

Cambia by NFP

Nordora

Novawood

Karava

Thermoarena

Bingaman & Son Lumber

AHC Hardwood Group

Westwood Millworks

Ducerf Group

Tantimber

LDCwood

Thermalwood Canada

HJT-Holz Oy

Fr?slev Tr?

Heatwood

Ha?ep Entegre

PowerWood

Abodo Wood

Naswood

Koshii & Co., Ltd.

Scottywood Canada

SahaKuutio Oy

Thermo-Drewno

KUNN YIH WOOD

Zhangjiagang Jiuding Wood

Key Questions Answered:

1. How big is the global Thermally-Modified Timber (TMT) market?
2. What is the demand of the global Thermally-Modified Timber (TMT) market?
3. What is the year over year growth of the global Thermally-Modified Timber (TMT) market?
4. What is the production and production value of the global Thermally-Modified Timber (TMT) market?
5. Who are the key producers in the global Thermally-Modified Timber (TMT) market?
6. What are the growth factors driving the market demand?

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