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

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Abstracts

The global Thermally Modified Wood 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 Wood sales reached approximately 898 K Cubic Meters with an average global market price of around 680 USD per Cubic Meter.

Thermally Modified Wood (TMW) refers to natural timber that has been upgraded through a controlled high-temperature process, typically using steam, low-oxygen conditions or inert media, to alter the wood cell-wall chemistry and reduce hygroscopicity, improve dimensional stability, enhance decay resistance and generate a darker, more uniform appearance. Unlike conventional preservative-treated wood, TMW does not primarily rely on biocides, heavy-metal salts or resin impregnation; its value comes from thermal modification that converts ordinary softwood, hardwood or fast-growing species into a higher-performance material. It is widely used in exterior cladding, decking, terraces, solar shading, door and window components, saunas, interior panels, furniture and landscape structures. For market research purposes, the statistical scope should include industrially thermally modified boards, profiles, decking, siding and customized components, while excluding ordinary kiln-dried lumber, chemically treated wood, decorative carbonized panels and merely surface-stained timber.

Thermally Modified Wood is a medium-to-high value-added material driven by timber resources, thermal-processing know-how and architectural applications. Its gross margin is generally higher than that of commodity sawn timber or kiln-dried lumber, but lower than that of premium customized furniture, branded outdoor systems and highly engineered building products. Based on public financial disclosures from wood-product

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companies, market positioning of TMW producers and typical processing cost structures, the overall gross margin of global TMW manufacturers is estimated at around 22%?38%. Standard boards, blanks and OEM suppliers are usually closer to 18%?28%, while companies with branded channels, certification systems, stable architect/specifier access and profile-processing capabilities may reach 30%?45%. Margins can be compressed when timber prices, energy costs or kiln utilization move unfavorably. The upstream chain includes logs, sawn timber, kiln-dried lumber, energy, steam systems, thermal kilns, grading and moisture-control equipment. The midstream stage covers heat treatment, conditioning, planing, profiling, finger-jointing, coating, packaging and quality testing. Downstream demand comes from building-material distributors, timber traders, fa?ade contractors, landscape companies, window and door manufacturers, furniture makers, sauna producers and architectural projects. Profitability depends not only on the heat-treatment process, but also on raw-material grading, process consistency, outdoor durability validation, profile design, inventory turnover and regional channel capability.

Market Development Opportunities & Main Driving Factors

The key growth opportunity for Thermally Modified Wood comes from the combined momentum of building decarbonization, outdoor-living upgrades and substitution demand for natural materials. Building renovation policies in Europe, green building standards, circular-material strategies and the wider adoption of timber construction are encouraging architects and property owners to seek materials that offer weather resistance, low maintenance, natural aesthetics and a lower environmental burden. The EU Renovation Wave, which aims to accelerate large-scale building renovation by 2030, increases the relevance of timber and bio-based materials in fa?ades, envelope upgrades and public-building refurbishment. At the same time, major forest-product companies continue to position wood construction and renewable materials as long-term growth themes, indicating that wood-based building products are shifting from conventional commodity materials toward low-carbon building solutions. Because TMW can improve the dimensional stability and outdoor suitability of ordinary timber without relying on conventional preservatives, it can replace selected tropical hardwood, preservative-treated lumber and composite decking applications while increasing the value of fast-growing or regional wood species.

Market Challenges, Risks, & Restraints

The main constraints for TMW are cost, performance boundaries and market education. The process requires dedicated kilns, energy input, stable treatment curves and longer

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processing cycles, making its unit cost higher than ordinary kiln-dried lumber. When log, sawn timber, electricity, gas or logistics costs fluctuate, small and mid-sized producers face stronger margin volatility. TMW improves dimensional stability and decay resistance, but it should not be treated as a universal outdoor material. In high-termite-pressure regions, long-term water exposure, poor ventilation or structural load-bearing applications, suitability still depends on species, treatment class, installation details, coating strategy and design rules. Research also shows that performance in severe decay and insect environments needs careful validation. In addition, thermal modification may change mechanical properties and increase brittleness, creating trade-offs in bending strength, impact resistance and structural applications. On the market side, customers may confuse TMW with charred wood, preservative-treated wood or stained decorative boards. Without credible standards, durability documentation and project references, producers may struggle to fully capture the intended price premium.

Downstream Demand Trends

Downstream demand is moving from simple board purchasing toward integrated fa?ade and outdoor-space solutions. In residential markets, terraces, gardens, fences, solar shading, outdoor kitchens and poolside decking are bringing TMW into premium home-improvement and landscape projects. In commercial buildings, hotels, offices, schools, cultural venues and public spaces increasingly value fa?ade identity, low-carbon storytelling and material tactility, supporting demand for cladding, battens, screens and customized profiles. Interior applications such as saunas, wall panels, ceilings, furniture and acoustic decoration continue to benefit from Nordic design preferences, natural texture, light weight and dimensional stability. Future customers will focus more on life-cycle cost rather than initial purchase price alone, so brands with stable supply, certification documents, installation guidelines, architect support, BIM resources and regional after-sales capabilities 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, TMW is likely to evolve from a niche eco-friendly timber product into an important specialty material for green fa?ades, outdoor living and premium wood design.

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

This report is a detailed and comprehensive analysis of the world market for Thermally Modified Wood and provides market size (US$ million) and Year-over-Year (YoY)

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Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Thermally Modified Wood that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Thermally Modified Wood total production and demand, 2021-2032, (K Cubic Meters)
Global Thermally Modified Wood total production value, 2021-2032, (USD Million)
Global Thermally Modified Wood production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Cubic Meters), (based on production site)
Global Thermally Modified Wood consumption by region & country, CAGR, 2021-2032 & (K Cubic Meters)
U.S. VS China: Thermally Modified Wood domestic production, consumption, key domestic manufacturers and share
Global Thermally Modified Wood production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Cubic Meters)
Global Thermally Modified Wood production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Cubic Meters)
Global Thermally Modified Wood production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Cubic Meters)

This report profiles key players in the global Thermally 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 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 Wood 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

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2027-2032 as the forecast year.

Global Thermally Modified Wood Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Thermally Modified Wood Market, Segmentation by Type:

Thermo-S

Thermo-D

Other

Global Thermally Modified Wood Market, Segmentation by Treatment Route:

Steam-based Thermal Modification

Oil Heat Treatment Modification

Nitrogen / Inert Gas Heat Treatment Modification

Hydrothermal / Wet Thermal Modification

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Vacuum Thermal Modification

Others

Global Thermally Modified Wood Market, Segmentation by Wood Species:

Thermally Modified Softwood

Thermally Modified Hardwood

Thermally Modified Specialty Wood

Global Thermally Modified Wood 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 Wood Market, Segmentation by Application:

Residential Buildings

Commercial Buildings

Outdoor Living / Landscaping

Others

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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?

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

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Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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

+357 96 030922
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3.2 World Thermally Modified Wood Production by Manufacturer (2021-2026)
3.3 World Thermally Modified Wood Average Price by Manufacturer (2021-2026)
3.4 Thermally Modified Wood Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Thermally Modified Wood Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Thermally Modified Wood in 2025
  3.5.3 Global Concentration Ratios (CR8) for Thermally Modified Wood in 2025
3.6 Thermally Modified Wood Market: Overall Company Footprint Analysis
  3.6.1 Thermally Modified Wood Market: Region Footprint
  3.6.2 Thermally Modified Wood Market: Company Product Type Footprint
  3.6.3 Thermally 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: Thermally Modified Wood Production Value Comparison
  4.1.1 United States VS China: Thermally Modified Wood Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Thermally Modified Wood Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Thermally Modified Wood Production Comparison
  4.2.1 United States VS China: Thermally Modified Wood Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Thermally Modified Wood Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Thermally Modified Wood Consumption Comparison
  4.3.1 United States VS China: Thermally Modified Wood Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Thermally Modified Wood Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Thermally Modified Wood Manufacturers and Market Share, 2021-2026
  4.4.1 United States Based Thermally Modified Wood Manufacturers, Headquarters and Production Site (States, Country)

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4.4.2 United States Based Manufacturers Thermally Modified Wood Production Value (2021-2026)
4.4.3 United States Based Manufacturers Thermally Modified Wood Production (2021-2026)
4.5 China Based Thermally Modified Wood Manufacturers and Market Share
4.5.1 China Based Thermally Modified Wood Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Thermally Modified Wood Production Value (2021-2026)
4.5.3 China Based Manufacturers Thermally Modified Wood Production (2021-2026)
4.6 Rest of World Based Thermally Modified Wood Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Thermally Modified Wood Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Thermally Modified Wood Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Thermally Modified Wood Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Thermally Modified Wood Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Thermo-S
5.2.2 Thermo-D
5.2.3 Other
5.3 Market Segment by Type
5.3.1 World Thermally Modified Wood Production by Type (2021-2032)
5.3.2 World Thermally Modified Wood Production Value by Type (2021-2032)
5.3.3 World Thermally Modified Wood Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY TREATMENT ROUTE

6.1 World Thermally Modified Wood Market Size Overview by Treatment Route: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Treatment Route
6.2.1 Steam-based Thermal Modification
6.2.2 Oil Heat Treatment Modification

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6.2.3 Nitrogen / Inert Gas Heat Treatment Modification
6.2.4 Hydrothermal / Wet Thermal Modification
6.2.5 Vacuum Thermal Modification
6.2.6 Others
6.3 Market Segment by Treatment Route
6.3.1 World Thermally Modified Wood Production by Treatment Route (2021-2032)
6.3.2 World Thermally Modified Wood Production Value by Treatment Route (2021-2032)
6.3.3 World Thermally Modified Wood Average Price by Treatment Route (2021-2032)

7 MARKET ANALYSIS BY WOOD SPECIES

7.1 World Thermally Modified Wood Market Size Overview by Wood Species: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Wood Species
7.2.1 Thermally Modified Softwood
7.2.2 Thermally Modified Hardwood
7.2.3 Thermally Modified Specialty Wood
7.3 Market Segment by Wood Species
7.3.1 World Thermally Modified Wood Production by Wood Species (2021-2032)
7.3.2 World Thermally Modified Wood Production Value by Wood Species (2021-2032)
7.3.3 World Thermally Modified Wood Average Price by Wood Species (2021-2032)

8 MARKET ANALYSIS BY PRODUCT FORM

8.1 World Thermally Modified Wood Market Size Overview by Product Form: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Product Form
8.2.1 Thermally Modified Lumber / Sawn Timber
8.2.2 Thermally Modified Cladding
8.2.3 Thermally Modified Decking
8.2.4 Thermally Modified Panels / Interior Profiles
8.2.5 Thermally Modified Components
8.3 Market Segment by Product Form
8.3.1 World Thermally Modified Wood Production by Product Form (2021-2032)
8.3.2 World Thermally Modified Wood Production Value by Product Form (2021-2032)
8.3.3 World Thermally Modified Wood Average Price by Product Form (2021-2032)

9 MARKET ANALYSIS BY APPLICATION

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9.1 World Thermally Modified Wood Market Size Overview by Application: 2021 VS 2025 VS 2032
9.2 Segment Introduction by Application
9.2.1 Residential Buildings
9.2.2 Commercial Buildings
9.2.3 Outdoor Living / Landscaping
9.2.4 Others
9.3 Market Segment by Application
9.3.1 World Thermally Modified Wood Production by Application (2021-2032)
9.3.2 World Thermally Modified Wood Production Value by Application (2021-2032)
9.3.3 World Thermally Modified Wood Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Arbor Wood
10.1.1 Arbor Wood Details
10.1.2 Arbor Wood Major Business
10.1.3 Arbor Wood Thermally Modified Wood Product and Services
10.1.4 Arbor Wood Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.1.5 Arbor Wood Recent Developments/Updates
10.1.6 Arbor Wood Competitive Strengths & Weaknesses
10.2 Lunawood
10.2.1 Lunawood Details
10.2.2 Lunawood Major Business
10.2.3 Lunawood Thermally Modified Wood Product and Services
10.2.4 Lunawood Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.2.5 Lunawood Recent Developments/Updates
10.2.6 Lunawood Competitive Strengths & Weaknesses
10.3 SWM-Wood
10.3.1 SWM-Wood Details
10.3.2 SWM-Wood Major Business
10.3.3 SWM-Wood Thermally Modified Wood Product and Services
10.3.4 SWM-Wood Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.3.5 SWM-Wood Recent Developments/Updates
10.3.6 SWM-Wood Competitive Strengths & Weaknesses

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10.4 Stora Enso
10.4.1 Stora Enso Details
10.4.2 Stora Enso Major Business
10.4.3 Stora Enso Thermally Modified Wood Product and Services
10.4.4 Stora Enso Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.4.5 Stora Enso Recent Developments/Updates
10.4.6 Stora Enso Competitive Strengths & Weaknesses
10.5 Thermory
10.5.1 Thermory Details
10.5.2 Thermory Major Business
10.5.3 Thermory Thermally Modified Wood Product and Services
10.5.4 Thermory Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.5.5 Thermory Recent Developments/Updates
10.5.6 Thermory Competitive Strengths & Weaknesses
10.6 Cambia by NFP
10.6.1 Cambia by NFP Details
10.6.2 Cambia by NFP Major Business
10.6.3 Cambia by NFP Thermally Modified Wood Product and Services
10.6.4 Cambia by NFP Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.6.5 Cambia by NFP Recent Developments/Updates
10.6.6 Cambia by NFP Competitive Strengths & Weaknesses
10.7 Nordora
10.7.1 Nordora Details
10.7.2 Nordora Major Business
10.7.3 Nordora Thermally Modified Wood Product and Services
10.7.4 Nordora Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.7.5 Nordora Recent Developments/Updates
10.7.6 Nordora Competitive Strengths & Weaknesses
10.8 Novawood
10.8.1 Novawood Details
10.8.2 Novawood Major Business
10.8.3 Novawood Thermally Modified Wood Product and Services
10.8.4 Novawood Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.8.5 Novawood Recent Developments/Updates

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info@marketpublishers.com

10.8.6 Novawood Competitive Strengths & Weaknesses
10.9 Karava
10.9.1 Karava Details
10.9.2 Karava Major Business
10.9.3 Karava Thermally Modified Wood Product and Services
10.9.4 Karava Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.9.5 Karava Recent Developments/Updates
10.9.6 Karava Competitive Strengths & Weaknesses
10.10 Thermoarena
10.10.1 Thermoarena Details
10.10.2 Thermoarena Major Business
10.10.3 Thermoarena Thermally Modified Wood Product and Services
10.10.4 Thermoarena Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.10.5 Thermoarena Recent Developments/Updates
10.10.6 Thermoarena Competitive Strengths & Weaknesses
10.11 Bingaman & Son Lumber
10.11.1 Bingaman & Son Lumber Details
10.11.2 Bingaman & Son Lumber Major Business
10.11.3 Bingaman & Son Lumber Thermally Modified Wood Product and Services
10.11.4 Bingaman & Son Lumber Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.11.5 Bingaman & Son Lumber Recent Developments/Updates
10.11.6 Bingaman & Son Lumber Competitive Strengths & Weaknesses
10.12 AHC Hardwood Group
10.12.1 AHC Hardwood Group Details
10.12.2 AHC Hardwood Group Major Business
10.12.3 AHC Hardwood Group Thermally Modified Wood Product and Services
10.12.4 AHC Hardwood Group Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.12.5 AHC Hardwood Group Recent Developments/Updates
10.12.6 AHC Hardwood Group Competitive Strengths & Weaknesses
10.13 Westwood Millworks
10.13.1 Westwood Millworks Details
10.13.2 Westwood Millworks Major Business
10.13.3 Westwood Millworks Thermally Modified Wood Product and Services
10.13.4 Westwood Millworks Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)

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10.13.5 Westwood Millworks Recent Developments/Updates
10.13.6 Westwood Millworks Competitive Strengths & Weaknesses
10.14 Ducerf Group
10.14.1 Ducerf Group Details
10.14.2 Ducerf Group Major Business
10.14.3 Ducerf Group Thermally Modified Wood Product and Services
10.14.4 Ducerf Group Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.14.5 Ducerf Group Recent Developments/Updates
10.14.6 Ducerf Group Competitive Strengths & Weaknesses
10.15 Tantimber
10.15.1 Tantimber Details
10.15.2 Tantimber Major Business
10.15.3 Tantimber Thermally Modified Wood Product and Services
10.15.4 Tantimber Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.15.5 Tantimber Recent Developments/Updates
10.15.6 Tantimber Competitive Strengths & Weaknesses
10.16 LDCwood
10.16.1 LDCwood Details
10.16.2 LDCwood Major Business
10.16.3 LDCwood Thermally Modified Wood Product and Services
10.16.4 LDCwood Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.16.5 LDCwood Recent Developments/Updates
10.16.6 LDCwood Competitive Strengths & Weaknesses
10.17 Thermalwood Canada
10.17.1 Thermalwood Canada Details
10.17.2 Thermalwood Canada Major Business
10.17.3 Thermalwood Canada Thermally Modified Wood Product and Services
10.17.4 Thermalwood Canada Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.17.5 Thermalwood Canada Recent Developments/Updates
10.17.6 Thermalwood Canada Competitive Strengths & Weaknesses
10.18 HJT-Holz Oy
10.18.1 HJT-Holz Oy Details
10.18.2 HJT-Holz Oy Major Business
10.18.3 HJT-Holz Oy Thermally Modified Wood Product and Services
10.18.4 HJT-Holz Oy Thermally Modified Wood Production, Price, Value, Gross

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info@marketpublishers.com

Margin and Market Share (2021-2026)
10.18.5 HJT-Holz Oy Recent Developments/Updates
10.18.6 HJT-Holz Oy Competitive Strengths & Weaknesses
10.19 Fr?slev Tr?
10.19.1 Fr?slev Tr? Details
10.19.2 Fr?slev Tr? Major Business
10.19.3 Fr?slev Tr? Thermally Modified Wood Product and Services
10.19.4 Fr?slev Tr? Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.19.5 Fr?slev Tr? Recent Developments/Updates
10.19.6 Fr?slev Tr? Competitive Strengths & Weaknesses
10.20 Heatwood
10.20.1 Heatwood Details
10.20.2 Heatwood Major Business
10.20.3 Heatwood Thermally Modified Wood Product and Services
10.20.4 Heatwood Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.20.5 Heatwood Recent Developments/Updates
10.20.6 Heatwood Competitive Strengths & Weaknesses
10.21 Ha?ep Entegre
10.21.1 Ha?ep Entegre Details
10.21.2 Ha?ep Entegre Major Business
10.21.3 Ha?ep Entegre Thermally Modified Wood Product and Services
10.21.4 Ha?ep Entegre Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.21.5 Ha?ep Entegre Recent Developments/Updates
10.21.6 Ha?ep Entegre Competitive Strengths & Weaknesses
10.22 PowerWood
10.22.1 PowerWood Details
10.22.2 PowerWood Major Business
10.22.3 PowerWood Thermally Modified Wood Product and Services
10.22.4 PowerWood Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.22.5 PowerWood Recent Developments/Updates
10.22.6 PowerWood Competitive Strengths & Weaknesses
10.23 Abodo Wood
10.23.1 Abodo Wood Details
10.23.2 Abodo Wood Major Business
10.23.3 Abodo Wood Thermally Modified Wood Product and Services

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10.23.4 Abodo Wood Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.23.5 Abodo Wood Recent Developments/Updates
10.23.6 Abodo Wood Competitive Strengths & Weaknesses
10.24 Naswood
10.24.1 Naswood Details
10.24.2 Naswood Major Business
10.24.3 Naswood Thermally Modified Wood Product and Services
10.24.4 Naswood Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.24.5 Naswood Recent Developments/Updates
10.24.6 Naswood Competitive Strengths & Weaknesses
10.25 Koshii & Co., Ltd.
10.25.1 Koshii & Co., Ltd. Details
10.25.2 Koshii & Co., Ltd. Major Business
10.25.3 Koshii & Co., Ltd. Thermally Modified Wood Product and Services
10.25.4 Koshii & Co., Ltd. Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.25.5 Koshii & Co., Ltd. Recent Developments/Updates
10.25.6 Koshii & Co., Ltd. Competitive Strengths & Weaknesses
10.26 Scottywood Canada
10.26.1 Scottywood Canada Details
10.26.2 Scottywood Canada Major Business
10.26.3 Scottywood Canada Thermally Modified Wood Product and Services
10.26.4 Scottywood Canada Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.26.5 Scottywood Canada Recent Developments/Updates
10.26.6 Scottywood Canada Competitive Strengths & Weaknesses
10.27 SahaKuutio Oy
10.27.1 SahaKuutio Oy Details
10.27.2 SahaKuutio Oy Major Business
10.27.3 SahaKuutio Oy Thermally Modified Wood Product and Services
10.27.4 SahaKuutio Oy Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.27.5 SahaKuutio Oy Recent Developments/Updates
10.27.6 SahaKuutio Oy Competitive Strengths & Weaknesses
10.28 Thermo-Drewno
10.28.1 Thermo-Drewno Details
10.28.2 Thermo-Drewno Major Business

+357 96 030922
info@marketpublishers.com

10.28.3 Thermo-Drewno Thermally Modified Wood Product and Services
10.28.4 Thermo-Drewno Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.28.5 Thermo-Drewno Recent Developments/Updates
10.28.6 Thermo-Drewno Competitive Strengths & Weaknesses
10.29 KUNN YIH WOOD
10.29.1 KUNN YIH WOOD Details
10.29.2 KUNN YIH WOOD Major Business
10.29.3 KUNN YIH WOOD Thermally Modified Wood Product and Services
10.29.4 KUNN YIH WOOD Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.29.5 KUNN YIH WOOD Recent Developments/Updates
10.29.6 KUNN YIH WOOD Competitive Strengths & Weaknesses
10.30 Zhangjiagang Jiuding Wood
10.30.1 Zhangjiagang Jiuding Wood Details
10.30.2 Zhangjiagang Jiuding Wood Major Business
10.30.3 Zhangjiagang Jiuding Wood Thermally Modified Wood Product and Services
10.30.4 Zhangjiagang Jiuding Wood Thermally Modified Wood Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.30.5 Zhangjiagang Jiuding Wood Recent Developments/Updates
10.30.6 Zhangjiagang Jiuding Wood Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

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

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

+357 96 030922
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13.1 Methodology
13.2 Research Process and Data Source
13.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World Thermally Modified Wood Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Thermally Modified Wood Production Value by Region (2021-2026) & (USD Million)
Table 3. World Thermally Modified Wood Production Value by Region (2027-2032) & (USD Million)
Table 4. World Thermally Modified Wood Production Value Market Share by Region (2021-2026)
Table 5. World Thermally Modified Wood Production Value Market Share by Region (2027-2032)
Table 6. World Thermally Modified Wood Production by Region (2021-2026) & (K Cubic Meters)
Table 7. World Thermally Modified Wood Production by Region (2027-2032) & (K Cubic Meters)
Table 8. World Thermally Modified Wood Production Market Share by Region (2021-2026)
Table 9. World Thermally Modified Wood Production Market Share by Region (2027-2032)
Table 10. World Thermally Modified Wood Average Price by Region (2021-2026) & (US$/Cubic Meter)
Table 11. World Thermally Modified Wood Average Price by Region (2027-2032) & (US$/Cubic Meter)
Table 12. Thermally Modified Wood Major Market Trends
Table 13. World Thermally Modified Wood Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Cubic Meters)
Table 14. World Thermally Modified Wood Consumption by Region (2021-2026) & (K Cubic Meters)
Table 15. World Thermally Modified Wood Consumption Forecast by Region (2027-2032) & (K Cubic Meters)
Table 16. World Thermally Modified Wood Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Thermally Modified Wood Producers in 2025
Table 18. World Thermally Modified Wood Production by Manufacturer (2021-2026) & (K Cubic Meters)

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Table 19. Production Market Share of Key Thermally Modified Wood Producers in 2025
Table 20. World Thermally Modified Wood Average Price by Manufacturer (2021-2026) & (US$/Cubic Meter)
Table 21. Global Thermally Modified Wood Company Evaluation Quadrant
Table 22. World Thermally Modified Wood Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Thermally Modified Wood Production Site of Key Manufacturer
Table 24. Thermally Modified Wood Market: Company Product Type Footprint
Table 25. Thermally Modified Wood Market: Company Product Application Footprint
Table 26. Thermally Modified Wood Competitive Factors
Table 27. Thermally Modified Wood New Entrant and Capacity Expansion Plans
Table 28. Thermally Modified Wood Mergers & Acquisitions Activity
Table 29. United States VS China Thermally Modified Wood Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Thermally Modified Wood Production Comparison, (2021 & 2025 & 2032) & (K Cubic Meters)
Table 31. United States VS China Thermally Modified Wood Consumption Comparison, (2021 & 2025 & 2032) & (K Cubic Meters)
Table 32. United States Based Thermally Modified Wood Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Thermally Modified Wood Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Thermally Modified Wood Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Thermally Modified Wood Production (2021-2026) & (K Cubic Meters)
Table 36. United States Based Manufacturers Thermally Modified Wood Production Market Share (2021-2026)
Table 37. China Based Thermally Modified Wood Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Thermally Modified Wood Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Thermally Modified Wood Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Thermally Modified Wood Production, (2021-2026) & (K Cubic Meters)
Table 41. China Based Manufacturers Thermally Modified Wood Production Market Share (2021-2026)

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Table 42. Rest of World Based Thermally Modified Wood Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Thermally Modified Wood Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Thermally Modified Wood Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Thermally Modified Wood Production, (2021-2026) & (K Cubic Meters)
Table 46. Rest of World Based Manufacturers Thermally Modified Wood Production Market Share (2021-2026)
Table 47. World Thermally Modified Wood Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Thermally Modified Wood Production by Type (2021-2026) & (K Cubic Meters)
Table 49. World Thermally Modified Wood Production by Type (2027-2032) & (K Cubic Meters)
Table 50. World Thermally Modified Wood Production Value by Type (2021-2026) & (USD Million)
Table 51. World Thermally Modified Wood Production Value by Type (2027-2032) & (USD Million)
Table 52. World Thermally Modified Wood Average Price by Type (2021-2026) & (US$/Cubic Meter)
Table 53. World Thermally Modified Wood Average Price by Type (2027-2032) & (US$/Cubic Meter)
Table 54. World Thermally Modified Wood Production Value by Treatment Route, (USD Million), 2021 & 2025 & 2032
Table 55. World Thermally Modified Wood Production by Treatment Route (2021-2026) & (K Cubic Meters)
Table 56. World Thermally Modified Wood Production by Treatment Route (2027-2032) & (K Cubic Meters)
Table 57. World Thermally Modified Wood Production Value by Treatment Route (2021-2026) & (USD Million)
Table 58. World Thermally Modified Wood Production Value by Treatment Route (2027-2032) & (USD Million)
Table 59. World Thermally Modified Wood Average Price by Treatment Route (2021-2026) & (US$/Cubic Meter)
Table 60. World Thermally Modified Wood Average Price by Treatment Route (2027-2032) & (US$/Cubic Meter)
Table 61. World Thermally Modified Wood Production Value by Wood Species, (USD

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Million), 2021 & 2025 & 2032
Table 62. World Thermally Modified Wood Production by Wood Species (2021-2026) & (K Cubic Meters)
Table 63. World Thermally Modified Wood Production by Wood Species (2027-2032) & (K Cubic Meters)
Table 64. World Thermally Modified Wood Production Value by Wood Species (2021-2026) & (USD Million)
Table 65. World Thermally Modified Wood Production Value by Wood Species (2027-2032) & (USD Million)
Table 66. World Thermally Modified Wood Average Price by Wood Species (2021-2026) & (US$/Cubic Meter)
Table 67. World Thermally Modified Wood Average Price by Wood Species (2027-2032) & (US$/Cubic Meter)
Table 68. World Thermally Modified Wood Production Value by Product Form, (USD Million), 2021 & 2025 & 2032
Table 69. World Thermally Modified Wood Production by Product Form (2021-2026) & (K Cubic Meters)
Table 70. World Thermally Modified Wood Production by Product Form (2027-2032) & (K Cubic Meters)
Table 71. World Thermally Modified Wood Production Value by Product Form (2021-2026) & (USD Million)
Table 72. World Thermally Modified Wood Production Value by Product Form (2027-2032) & (USD Million)
Table 73. World Thermally Modified Wood Average Price by Product Form (2021-2026) & (US$/Cubic Meter)
Table 74. World Thermally Modified Wood Average Price by Product Form (2027-2032) & (US$/Cubic Meter)
Table 75. World Thermally Modified Wood Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 76. World Thermally Modified Wood Production by Application (2021-2026) & (K Cubic Meters)
Table 77. World Thermally Modified Wood Production by Application (2027-2032) & (K Cubic Meters)
Table 78. World Thermally Modified Wood Production Value by Application (2021-2026) & (USD Million)
Table 79. World Thermally Modified Wood Production Value by Application (2027-2032) & (USD Million)
Table 80. World Thermally Modified Wood Average Price by Application (2021-2026) & (US$/Cubic Meter)

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Table 81. World Thermally Modified Wood Average Price by Application (2027-2032) & (US$/Cubic Meter)
Table 82. Arbor Wood Basic Information, Manufacturing Base and Competitors
Table 83. Arbor Wood Major Business
Table 84. Arbor Wood Thermally Modified Wood Product and Services
Table 85. Arbor Wood Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 86. Arbor Wood Recent Developments/Updates
Table 87. Arbor Wood Competitive Strengths & Weaknesses
Table 88. Lunawood Basic Information, Manufacturing Base and Competitors
Table 89. Lunawood Major Business
Table 90. Lunawood Thermally Modified Wood Product and Services
Table 91. Lunawood Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 92. Lunawood Recent Developments/Updates
Table 93. Lunawood Competitive Strengths & Weaknesses
Table 94. SWM-Wood Basic Information, Manufacturing Base and Competitors
Table 95. SWM-Wood Major Business
Table 96. SWM-Wood Thermally Modified Wood Product and Services
Table 97. SWM-Wood Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 98. SWM-Wood Recent Developments/Updates
Table 99. SWM-Wood Competitive Strengths & Weaknesses
Table 100. Stora Enso Basic Information, Manufacturing Base and Competitors
Table 101. Stora Enso Major Business
Table 102. Stora Enso Thermally Modified Wood Product and Services
Table 103. Stora Enso Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 104. Stora Enso Recent Developments/Updates
Table 105. Stora Enso Competitive Strengths & Weaknesses
Table 106. Thermory Basic Information, Manufacturing Base and Competitors
Table 107. Thermory Major Business
Table 108. Thermory Thermally Modified Wood Product and Services
Table 109. Thermory Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share

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(2021-2026)
Table 110. Thermory Recent Developments/Updates
Table 111. Thermory Competitive Strengths & Weaknesses
Table 112. Cambia by NFP Basic Information, Manufacturing Base and Competitors
Table 113. Cambia by NFP Major Business
Table 114. Cambia by NFP Thermally Modified Wood Product and Services
Table 115. Cambia by NFP Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 116. Cambia by NFP Recent Developments/Updates
Table 117. Cambia by NFP Competitive Strengths & Weaknesses
Table 118. Nordora Basic Information, Manufacturing Base and Competitors
Table 119. Nordora Major Business
Table 120. Nordora Thermally Modified Wood Product and Services
Table 121. Nordora Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 122. Nordora Recent Developments/Updates
Table 123. Nordora Competitive Strengths & Weaknesses
Table 124. Novawood Basic Information, Manufacturing Base and Competitors
Table 125. Novawood Major Business
Table 126. Novawood Thermally Modified Wood Product and Services
Table 127. Novawood Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 128. Novawood Recent Developments/Updates
Table 129. Novawood Competitive Strengths & Weaknesses
Table 130. Karava Basic Information, Manufacturing Base and Competitors
Table 131. Karava Major Business
Table 132. Karava Thermally Modified Wood Product and Services
Table 133. Karava Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 134. Karava Recent Developments/Updates
Table 135. Karava Competitive Strengths & Weaknesses
Table 136. Thermoarena Basic Information, Manufacturing Base and Competitors
Table 137. Thermoarena Major Business
Table 138. Thermoarena Thermally Modified Wood Product and Services
Table 139. Thermoarena Thermally Modified Wood Production (K Cubic Meters), Price

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(US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 140. Thermoarena Recent Developments/Updates
Table 141. Thermoarena Competitive Strengths & Weaknesses
Table 142. Bingaman & Son Lumber Basic Information, Manufacturing Base and Competitors
Table 143. Bingaman & Son Lumber Major Business
Table 144. Bingaman & Son Lumber Thermally Modified Wood Product and Services
Table 145. Bingaman & Son Lumber Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 146. Bingaman & Son Lumber Recent Developments/Updates
Table 147. Bingaman & Son Lumber Competitive Strengths & Weaknesses
Table 148. AHC Hardwood Group Basic Information, Manufacturing Base and Competitors
Table 149. AHC Hardwood Group Major Business
Table 150. AHC Hardwood Group Thermally Modified Wood Product and Services
Table 151. AHC Hardwood Group Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 152. AHC Hardwood Group Recent Developments/Updates
Table 153. AHC Hardwood Group Competitive Strengths & Weaknesses
Table 154. Westwood Millworks Basic Information, Manufacturing Base and Competitors
Table 155. Westwood Millworks Major Business
Table 156. Westwood Millworks Thermally Modified Wood Product and Services
Table 157. Westwood Millworks Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 158. Westwood Millworks Recent Developments/Updates
Table 159. Westwood Millworks Competitive Strengths & Weaknesses
Table 160. Ducerf Group Basic Information, Manufacturing Base and Competitors
Table 161. Ducerf Group Major Business
Table 162. Ducerf Group Thermally Modified Wood Product and Services
Table 163. Ducerf Group Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 164. Ducerf Group Recent Developments/Updates
Table 165. Ducerf Group Competitive Strengths & Weaknesses

+357 96 030922
info@marketpublishers.com

Table 166. Tantimber Basic Information, Manufacturing Base and Competitors
Table 167. Tantimber Major Business
Table 168. Tantimber Thermally Modified Wood Product and Services
Table 169. Tantimber Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 170. Tantimber Recent Developments/Updates
Table 171. Tantimber Competitive Strengths & Weaknesses
Table 172. LDCwood Basic Information, Manufacturing Base and Competitors
Table 173. LDCwood Major Business
Table 174. LDCwood Thermally Modified Wood Product and Services
Table 175. LDCwood Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 176. LDCwood Recent Developments/Updates
Table 177. LDCwood Competitive Strengths & Weaknesses
Table 178. Thermalwood Canada Basic Information, Manufacturing Base and Competitors
Table 179. Thermalwood Canada Major Business
Table 180. Thermalwood Canada Thermally Modified Wood Product and Services
Table 181. Thermalwood Canada Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 182. Thermalwood Canada Recent Developments/Updates
Table 183. Thermalwood Canada Competitive Strengths & Weaknesses
Table 184. HJT-Holz Oy Basic Information, Manufacturing Base and Competitors
Table 185. HJT-Holz Oy Major Business
Table 186. HJT-Holz Oy Thermally Modified Wood Product and Services
Table 187. HJT-Holz Oy Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 188. HJT-Holz Oy Recent Developments/Updates
Table 189. HJT-Holz Oy Competitive Strengths & Weaknesses
Table 190. Fr?slev Tr? Basic Information, Manufacturing Base and Competitors
Table 191. Fr?slev Tr? Major Business
Table 192. Fr?slev Tr? Thermally Modified Wood Product and Services
Table 193. Fr?slev Tr? Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

+357 96 030922
info@marketpublishers.com

Table 194. Fr?slev Tr? Recent Developments/Updates
Table 195. Fr?slev Tr? Competitive Strengths & Weaknesses
Table 196. Heatwood Basic Information, Manufacturing Base and Competitors
Table 197. Heatwood Major Business
Table 198. Heatwood Thermally Modified Wood Product and Services
Table 199. Heatwood Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 200. Heatwood Recent Developments/Updates
Table 201. Heatwood Competitive Strengths & Weaknesses
Table 202. Ha?ep Entegre Basic Information, Manufacturing Base and Competitors
Table 203. Ha?ep Entegre Major Business
Table 204. Ha?ep Entegre Thermally Modified Wood Product and Services
Table 205. Ha?ep Entegre Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 206. Ha?ep Entegre Recent Developments/Updates
Table 207. Ha?ep Entegre Competitive Strengths & Weaknesses
Table 208. PowerWood Basic Information, Manufacturing Base and Competitors
Table 209. PowerWood Major Business
Table 210. PowerWood Thermally Modified Wood Product and Services
Table 211. PowerWood Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 212. PowerWood Recent Developments/Updates
Table 213. PowerWood Competitive Strengths & Weaknesses
Table 214. Abodo Wood Basic Information, Manufacturing Base and Competitors
Table 215. Abodo Wood Major Business
Table 216. Abodo Wood Thermally Modified Wood Product and Services
Table 217. Abodo Wood Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 218. Abodo Wood Recent Developments/Updates
Table 219. Abodo Wood Competitive Strengths & Weaknesses
Table 220. Naswood Basic Information, Manufacturing Base and Competitors
Table 221. Naswood Major Business
Table 222. Naswood Thermally Modified Wood Product and Services
Table 223. Naswood Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share

+357 96 030922
info@marketpublishers.com

(2021-2026)
Table 224. Naswood Recent Developments/Updates
Table 225. Naswood Competitive Strengths & Weaknesses
Table 226. Koshii & Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 227. Koshii & Co., Ltd. Major Business
Table 228. Koshii & Co., Ltd. Thermally Modified Wood Product and Services
Table 229. Koshii & Co., Ltd. Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 230. Koshii & Co., Ltd. Recent Developments/Updates
Table 231. Koshii & Co., Ltd. Competitive Strengths & Weaknesses
Table 232. Scottywood Canada Basic Information, Manufacturing Base and Competitors
Table 233. Scottywood Canada Major Business
Table 234. Scottywood Canada Thermally Modified Wood Product and Services
Table 235. Scottywood Canada Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 236. Scottywood Canada Recent Developments/Updates
Table 237. Scottywood Canada Competitive Strengths & Weaknesses
Table 238. SahaKuutio Oy Basic Information, Manufacturing Base and Competitors
Table 239. SahaKuutio Oy Major Business
Table 240. SahaKuutio Oy Thermally Modified Wood Product and Services
Table 241. SahaKuutio Oy Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 242. SahaKuutio Oy Recent Developments/Updates
Table 243. SahaKuutio Oy Competitive Strengths & Weaknesses
Table 244. Thermo-Drewno Basic Information, Manufacturing Base and Competitors
Table 245. Thermo-Drewno Major Business
Table 246. Thermo-Drewno Thermally Modified Wood Product and Services
Table 247. Thermo-Drewno Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 248. Thermo-Drewno Recent Developments/Updates
Table 249. Thermo-Drewno Competitive Strengths & Weaknesses
Table 250. KUNN YIH WOOD Basic Information, Manufacturing Base and Competitors
Table 251. KUNN YIH WOOD Major Business
Table 252. KUNN YIH WOOD Thermally Modified Wood Product and Services

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Table 253. KUNN YIH WOOD Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 254. KUNN YIH WOOD Recent Developments/Updates
Table 255. KUNN YIH WOOD Competitive Strengths & Weaknesses
Table 256. Zhangjiagang Jiuding Wood Basic Information, Manufacturing Base and Competitors
Table 257. Zhangjiagang Jiuding Wood Major Business
Table 258. Zhangjiagang Jiuding Wood Thermally Modified Wood Product and Services
Table 259. Zhangjiagang Jiuding Wood Thermally Modified Wood Production (K Cubic Meters), Price (US$/Cubic Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 260. Zhangjiagang Jiuding Wood Recent Developments/Updates
Table 261. Zhangjiagang Jiuding Wood Competitive Strengths & Weaknesses
Table 262. Global Key Players of Thermally Modified Wood Upstream (Raw Materials)
Table 263. Global Thermally Modified Wood Typical Customers
Table 264. Thermally Modified Wood Typical Distributors

+357 96 030922
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List Of Figures

LIST OF FIGURES

Figure 1. Thermally Modified Wood Picture
Figure 2. World Thermally Modified Wood Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Thermally Modified Wood Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Thermally Modified Wood Production (2021-2032) & (K Cubic Meters)
Figure 5. World Thermally Modified Wood Average Price (2021-2032) & (US$/Cubic Meter)
Figure 6. World Thermally Modified Wood Production Value Market Share by Region (2021-2032)
Figure 7. World Thermally Modified Wood Production Market Share by Region (2021-2032)
Figure 8. North America Thermally Modified Wood Production (2021-2032) & (K Cubic Meters)
Figure 9. Europe Thermally Modified Wood Production (2021-2032) & (K Cubic Meters)
Figure 10. China Thermally Modified Wood Production (2021-2032) & (K Cubic Meters)
Figure 11. Japan Thermally Modified Wood Production (2021-2032) & (K Cubic Meters)
Figure 12. Thermally Modified Wood Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Thermally Modified Wood Consumption (2021-2032) & (K Cubic Meters)
Figure 15. World Thermally Modified Wood Consumption Market Share by Region (2021-2032)
Figure 16. United States Thermally Modified Wood Consumption (2021-2032) & (K Cubic Meters)
Figure 17. China Thermally Modified Wood Consumption (2021-2032) & (K Cubic Meters)
Figure 18. Europe Thermally Modified Wood Consumption (2021-2032) & (K Cubic Meters)
Figure 19. Japan Thermally Modified Wood Consumption (2021-2032) & (K Cubic Meters)
Figure 20. South Korea Thermally Modified Wood Consumption (2021-2032) & (K Cubic Meters)
Figure 21. ASEAN Thermally Modified Wood Consumption (2021-2032) & (K Cubic Meters)

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Figure 22. India Thermally Modified Wood Consumption (2021-2032) & (K Cubic Meters)
Figure 23. Producer Shipments of Thermally Modified Wood by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Thermally Modified Wood Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Thermally Modified Wood Markets in 2025
Figure 26. United States VS China: Thermally Modified Wood Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: Thermally Modified Wood Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Thermally Modified Wood Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Thermally Modified Wood Production Market Share 2025
Figure 30. China Based Manufacturers Thermally Modified Wood Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Thermally Modified Wood Production Market Share 2025
Figure 32. World Thermally Modified Wood Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Thermally Modified Wood Production Value Market Share by Type in 2025
Figure 34. Thermo-S
Figure 35. Thermo-D
Figure 36. Other
Figure 37. World Thermally Modified Wood Production Market Share by Type (2021-2032)
Figure 38. World Thermally Modified Wood Production Value Market Share by Type (2021-2032)
Figure 39. World Thermally Modified Wood Average Price by Type (2021-2032) & (US$/Cubic Meter)
Figure 40. World Thermally Modified Wood Production Value by Treatment Route, (USD Million), 2021 & 2025 & 2032
Figure 41. World Thermally Modified Wood Production Value Market Share by Treatment Route in 2025
Figure 42. Steam-based Thermal Modification
Figure 43. Oil Heat Treatment Modification

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Figure 44. Nitrogen / Inert Gas Heat Treatment Modification
Figure 45. Hydrothermal / Wet Thermal Modification
Figure 46. Vacuum Thermal Modification
Figure 47. Others
Figure 48. World Thermally Modified Wood Production Market Share by Treatment Route (2021-2032)
Figure 49. World Thermally Modified Wood Production Value Market Share by Treatment Route (2021-2032)
Figure 50. World Thermally Modified Wood Average Price by Treatment Route (2021-2032) & (US$/Cubic Meter)
Figure 51. World Thermally Modified Wood Production Value by Wood Species, (USD Million), 2021 & 2025 & 2032
Figure 52. World Thermally Modified Wood Production Value Market Share by Wood Species in 2025
Figure 53. Thermally Modified Softwood
Figure 54. Thermally Modified Hardwood
Figure 55. Thermally Modified Specialty Wood
Figure 56. World Thermally Modified Wood Production Market Share by Wood Species (2021-2032)
Figure 57. World Thermally Modified Wood Production Value Market Share by Wood Species (2021-2032)
Figure 58. World Thermally Modified Wood Average Price by Wood Species (2021-2032) & (US$/Cubic Meter)
Figure 59. World Thermally Modified Wood Production Value by Product Form, (USD Million), 2021 & 2025 & 2032
Figure 60. World Thermally Modified Wood Production Value Market Share by Product Form in 2025
Figure 61. Thermally Modified Lumber / Sawn Timber
Figure 62. Thermally Modified Cladding
Figure 63. Thermally Modified Decking
Figure 64. Thermally Modified Panels / Interior Profiles
Figure 65. Thermally Modified Components
Figure 66. World Thermally Modified Wood Production Market Share by Product Form (2021-2032)
Figure 67. World Thermally Modified Wood Production Value Market Share by Product Form (2021-2032)
Figure 68. World Thermally Modified Wood Average Price by Product Form (2021-2032) & (US$/Cubic Meter)
Figure 69. World Thermally Modified Wood Production Value by Application, (USD

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Million), 2021 & 2025 & 2032
Figure 70. World Thermally Modified Wood Production Value Market Share by Application in 2025
Figure 71. Residential Buildings
Figure 72. Commercial Buildings
Figure 73. Outdoor Living / Landscaping
Figure 74. Others
Figure 75. World Thermally Modified Wood Production Market Share by Application (2021-2032)
Figure 76. World Thermally Modified Wood Production Value Market Share by Application (2021-2032)
Figure 77. World Thermally Modified Wood Average Price by Application (2021-2032) & (US$/Cubic Meter)
Figure 78. Thermally Modified Wood Industry Chain
Figure 79. Thermally Modified Wood Procurement Model
Figure 80. Thermally Modified Wood Sales Model
Figure 81. Thermally Modified Wood Sales Channels, Direct Sales, and Distribution
Figure 82. Methodology
Figure 83. Research Process and Data Source

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