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Thermally Modified Woods (TMT) Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Softwoods, Hardwoods), By Application (Residential, Commercial, Industrial), By Region, By Competition, 2020-2030F

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Abstracts

Market Overview

The Global Thermally Modified Woods (TMT) Market was valued at USD 1.3 billion in 2024 and is projected to reach USD 1.8 billion by 2030, growing at a CAGR of 5.4% during the forecast period. This growth is largely attributed to increasing demand for sustainable and non-toxic building materials. TMT serves as an eco-friendly alternative to chemically treated wood, offering superior resistance to decay, moisture, and insects, which makes it ideal for outdoor applications such as decking, cladding, and garden furniture. The material's rich, natural aesthetics and enhanced performance appeal to both architects and consumers seeking low-maintenance and durable solutions. Technological advancements in thermal treatment and kiln efficiency have improved scalability and cost-effectiveness, broadening market accessibility. Moreover, regulatory support for sustainable forestry practices and low-emission materials is encouraging adoption, particularly in Europe and North America. Simultaneously, rising construction activity and environmental consciousness in Asia-Pacific and Latin America are accelerating the market's expansion globally.

Key Market Drivers

Rising Demand for Sustainable and Eco-Friendly Building Materials

A major driver of the Thermally Modified Woods (TMT) market is the increasing

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emphasis on using environmentally friendly and non-toxic materials in construction. As concerns over climate change and sustainability intensify, developers, architects, and contractors are turning to renewable, low-impact alternatives. TMT is produced using only heat and steam, eliminating the use of harmful chemicals common in pressure-treated wood. This makes it safe, biodegradable, and suitable for use in green-certified projects, including LEED, WELL, and BREEAM.

Additionally, government policies are pushing for restrictions on the use of high-VOC materials and unsustainable timber, further boosting the appeal of TMT. Its ability to provide long-term durability without chemical upkeep aligns with circular economy principles and reduces environmental impact, making it a compelling choice in modern construction.

Key Market Challenges

High Initial Production and Processing Costs

The high cost of production remains a significant challenge for the thermally modified woods (TMT) market. The thermal modification process involves exposing wood to elevated temperatures—often over 160°C—in a controlled, steam-supported environment, necessitating specialized kilns and sophisticated systems for temperature and humidity regulation. These factors drive up both capital and operating costs.

For small and mid-sized producers, the investment required for such infrastructure can be prohibitive, limiting market participation and regional availability. Additionally, in areas with high energy costs or inadequate infrastructure, the economic feasibility of TMT production diminishes further. Certain softwoods may also experience a reduction in mechanical strength post-treatment, necessitating selective processing and post-treatment reinforcement, adding to time and cost pressures.

Key Market Trends

Rising Use of TMT in High-End Architectural and Outdoor Applications

An emerging trend in the global TMT market is its growing utilization in upscale architectural projects and premium outdoor designs. Designers and developers are increasingly specifying TMT for its rich grain, color depth, and stability in demanding weather conditions. Applications in exterior cladding, pergolas, fencing, decking, and garden furniture are expanding due to its low maintenance and long service life.

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Its natural beauty, enhanced through thermal modification without chemical staining, aligns with modern architectural preferences for organic and clean aesthetics. In luxury construction, especially in North America and parts of Europe, TMT is being adopted as a sustainable substitute for exotic hardwoods like teak, reducing reliance on endangered tropical species while maintaining visual appeal and durability.

Key Market Players

Thermory AS

Kebony AS

Stora Enso Oyj

Oy Lunawood Ltd

Novawood (Novawood Thermowood San. Tic. A.?.)

M SORA d.d.

Arxada AG (formerly Lonza Wood Protection)

Brimstone Woodfire Company

Report Scope:

In this report, the Global Thermally Modified Woods (TMT) Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Thermally Modified Woods (TMT) Market, By Type:

Softwoods

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Hardwoods

Thermally Modified Woods (TMT) Market, By Application:

Residential

Commercial

Industrial

Thermally Modified Woods (TMT) Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

Asia Pacific

China

India

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Japan

South Korea

Australia

South America

Brazil

Colombia

Argentina

Middle East & Africa

Saudi Arabia

UAE

South Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Thermally Modified Woods (TMT) Market.

Available Customizations:

Global Thermally Modified Woods (TMT) Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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