

Roundwood Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Roundwood is the unprocessed timber directly extracted from trees that have been cut and have their original cross-section and appearance in a natural round shape. It can be made available in both hardwood and softwood, depending on the nature of the trees and the end-use specifications. This raw material is available in cubic meters and serves as a fundamental resource in various industries, including construction, furniture manufacturing, the paper industry, and renewable energy production. Roundwood is the primary product of the wood supply chain and is harvested using either sustainable or commercial forestry practices, serving as an essential connection between the resources found in forests and the manufacturing and trade that occur around the world.

The Roundwood market is set to show a growth rate of about 3.54% during the forecast period (2025-2033F). Global demand for sustainable and renewable raw materials in various industries, including construction, furniture, paper, and bioenergy, is increasing, which contributes to the growth of the roundwood market. The growing urbanization and development of infrastructural projects are leading to an increase in the usage of timber, which fuels the roundwood market. Adding to this, growing concerns about the environment are driving the adoption of wood as a renewable source of building materials, replacing plastics and metals. The development of forestry management and certification increases sustainable timber harvesting and improves market confidence. Moreover, the development of the usage of biomass in energy production, and government incentives that promote these applications of renewable resources, catalyze further development of the market.

Based on the type category, the market is categorized into hardwood and softwood. Among these, Softwood has the highest market share in the roundwood market, as it is among the fastest-growing woods, highly available in

nature, and used in industries as construction materials and the paper industry. It is usually less expensive and easier to process as compared with hardwood. However, in the future, hardwood can be predicted to grow at a more accelerated rate based on the rising demand for high-end furniture, flooring, and specialty products that need durability and aesthetic-related features.

Based on the application category, the market is categorized into construction, furniture, pulp and paper, energy generation, panels and plywood, and others. Among these, the construction segment currently holds the largest market share since roundwood is actively used globally in the construction industry as a building material. The high demand for its use is facilitated by urbanization, infrastructure developments, and housing construction. However, the energy generation segment is expected to rapidly grow in the future, due to increased investments in renewable energy and bioenergy aimed at reducing carbon emissions.

Based on the distribution channel category, the market is segmented into direct sales and indirect sales. Among these, direct sales lead the market share of roundwood, as many clients, including large manufacturers and construction companies, prefer to obtain their timber through logging companies or plantations to guarantee the integrity of the supply chain and affordable costs. However, indirect sales through intermediaries, distributors, and dealers are likely to expand at a higher rate due to the rising market penetration in emerging regions and smaller end-users who use these channels to access and purchase products conveniently. Moreover, indirect sales growth is also boosted by the growth of digital platforms, which link the suppliers and buyers in a more effective way.

For a better understanding of the demand of Roundwood, the market is analyzed based on its worldwide adoption in countries such as North America (U.S., Canada, and the Rest of North America), Europe (Germany, U.K., France, Spain, Italy, Rest of Europe), Asia-Pacific (China, Japan, India, and the Rest of Asia-Pacific), and Rest of World. Among these, Europe has been the market leader due to its well-established forestry industry, high demand for construction and paper products, and its focus on sustainable forests, forest management, as well as certification. European countries, such as Germany, Sweden, and Finland, are also among the largest producers and exporters of roundwood, and they employ advanced processing technologies and have efficient supply chains. Also, strict environmental policies and certification bodies, e.g., FSC or

PEFC, help increase the credibility and even the competitiveness of the market on a worldwide scale. Domestic consumption, which is already high, combined with strong export potential, ensures the market dominance of Europe in the international roundwood market. The Asia Pacific region is, however, likely to be growing the fastest over the next years due to rapid urbanization, thriving manufacturing industries, and growing investments into renewable energy and bio products.

Some major players running in the market include Weyerhaeuser Company, Rayonier Inc., West Fraser Timber Co., Svenska Cellulosa AB (SCA), Holmen, Stora Enso, Green Diamond Resource Co., OneFortyOne, HVP Plantations, and Sumitomo Forestry Co., Ltd.

Contents

1 MARKET INTRODUCTION

- 1.1. Market Definitions
- 1.2. Main Objective
- 1.3. Stakeholders
- 1.4. Limitation

2 RESEARCH METHODOLOGY OR ASSUMPTION

- 2.1. Research Process of the Global Roundwood Market
- 2.2. Research Methodology of the Global Roundwood Market
- 2.3. Respondent Profile

3 EXECUTIVE SUMMARY

- 3.1. Industry Synopsis
- 3.2. Segmental Outlook
 - 3.2.1. Market Growth Intensity
- 3.3. Regional Outlook

4 MARKET DYNAMICS

- 4.1. Drivers
- 4.2. Opportunity
- 4.3. Restraints
- 4.4. Trends
- 4.5. PESTEL Analysis
- 4.6. Demand Side Analysis
- 4.7. Supply Side Analysis
 - 4.7.1. Merger & Acquisition
 - 4.7.2. Collaboration & Investment Scenario
 - 4.7.3. Industry Insights: Leading Startups and Their Unique Strategies

5 PRICING ANALYSIS

- 5.1. Regional Pricing Analysis
- 5.2. Price Influencing Factors

6 GLOBAL ROUNDWOOD MARKET REVENUE (USD MN), 2023-2033F

7 MARKET INSIGHTS BY TYPE

7.1. Hardwood

7.2. Softwood

8 MARKET INSIGHTS BY APPLICATION

8.1. Construction

8.2. Furniture

8.3. Pulp and Paper

8.4. Energy Generation

8.5. Panels and Plywood

8.6. Others

9 MARKET INSIGHTS BY DISTRIBUTION CHANNEL

9.1. Direct Sales

9.2. Indirect Sales

10 MARKET INSIGHTS BY REGION

10.1. North America

10.1.1. U.S.

10.1.2. Canada

10.1.3. Rest of North America

10.2. Europe

10.2.1. Germany

10.2.2. U.K.

10.2.3. France

10.2.4. Italy

10.2.5. Spain

10.2.6. Rest of Europe

10.3. Asia-Pacific

10.3.1. China

10.3.2. Japan

10.3.3. India

- 10.3.4. Rest of Asia-Pacific
- 10.4. Rest of World

11 VALUE CHAIN ANALYSIS

- 11.1. Marginal Analysis
- 11.2. List of Market Participants

12 COMPETITIVE LANDSCAPE

- 12.1. Competition Dashboard
- 12.2. Competitor Market Positioning Analysis
- 12.3. Porter Five Forces Analysis

13 COMPANY PROFILES

- 13.1. Weyerhaeuser Company
 - 13.1.1. Company Overview
 - 13.1.2. Key Financials
 - 13.1.3. SWOT Analysis
 - 13.1.4. Product Portfolio
 - 13.1.5. Recent Developments
- 13.2. Rayonier Inc.
- 13.3. West Fraser Timber Co.
- 13.4. Svenska Cellulosa AB (SCA)
- 13.5. Holmen
- 13.6. Stora Enso
- 13.7. Green Diamond Resource Co.
- 13.8. OneFortyOne
- 13.9. HVP Plantations
- 13.10. Sumitomo Forestry (incl. Sumitomo Forestry America)

14 ACRONYMS & ASSUMPTION

15 ANNEXURE

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