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Ressort: Wirtschaft und Finanzen

Global forest products sector

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When investigating the market developments, ex post, the trends and fluctuations are a net result from a large number of factors. The most important ones are related to the comparative advantage differences of industrial locations, and competitiveness differences of operators. Market access factors and variation in them are just one group of factors in the matrix.

Various forest products compete in the market place

between each other, and against other substitute materials. A position of a sole supplier of a particular species and grade is rare, usually there is a sequence of substitute products. A supplier's competitive position depends on the characteristics of product, the cost of the domestic value chain and the whole range of international trade determinants. The market access barriers and impediments have a tendency of working through a twin bladed "scissors" effect: The direct effect comes from the hindrance of the barrier or impediment itself, the indirect effect comes from the cost competitiveness handicap. The extra cost is caused by the constraint itself, or an unsuccessful and costly effort to remove it.

After a sharp decline in 2023, the global forest products sector saw signs of stabilization in 2024, according to Globalforest products facts and figures 2024, released on 24th December 2025 by the Food and Agriculture Organization of the United Nations (FAO).

The report highlights that global international trade in wood and paper products has regained momentum, with modest growth recorded across most major product groups.

The upswing comes after a 14 percent drop overall in trade of wood and paper products in 2023.

Global exports of wood and paper products increased only slightly by \$7 billion, or 1.4 percent, to reach \$486 billion in 2024 – but still surpassing all levels recorded before 2021.

Exports of non-wood forest products also grew to reach \$25 billion, underscoring the forest sector's broadening economic importance.

"Forests support millions of livelihoods worldwide, and the number is set to rise as forests offer more economic opportunities in a growing range of industries, including sustainable wood production," said FAO Director-General QU Dongyu.

The 2024 results reflect gradual market recovery in several regions, supported by increased production in most major product groups. Gains ranged from 2 percent for industrial roundwood, wood pellets and wood pulp, to between 4 and 5 percent for wood-based panels, paper and paperboard.

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Industrial roundwood removals – the total volume of wood harvested for uses other than energy – rose by 2 percent to 1.96 billion cubic metres in 2024, although its global trade declined by 1 percent to 96 million cubic metres.

While global sawnwood production remained nearly unchanged, the picture varied regionally. Output fell by 2 percent in North America but remained stable in Europe and the Asia-Pacific, while climbing 2 percent in Latin America and the Caribbean. Trade in sawnwood recorded no overall change compared to 2023.

Wood-based panels continued to build on the recovery seen in 2023, growing for a second consecutive year.

Global production expanded by 5 percent to 393 million cubic metres, with increases reported in all five regions. Trade in panels rose even faster, up 6 percent to 90 million cubic metres.

Wood pulp production climbed 3 percent to reach 189 million tonnes, while international trade expanded 2 percent to an all-time high of 73 million tonnes. Much of the additional supply originated in China and South America – particularly Brazil, Chile and Uruguay – reflecting the region’s growing competitiveness in pulp. Global consumption of recovered paper also edged up by 1 percent to 243 million tonnes worldwide.

Wood pellets have seen extraordinary growth in recent decades, mainly driven by bioenergy targets in Europe, the Republic of Korea and Japan. After a slight dip in 2023, global production returned to 48 million tonnes in 2024, equal to the 2022 level, and almost two-thirds – 31 million tonnes – entered global trade. Europe and North America remained the main producing regions, accounting for 47 percent and 28 percent of global output respectively, though the Asia-Pacific region increased its share from 14 percent in 2020 to 22 percent in 2024. When it came to consumption, Europe accounted for 70 percent, while the Asia-Pacific region accounted for 28 percent.

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