



# Global Overview of the Forestry, Wood and Paper

February 2026

Table of Contents

## INTRODUCTION

Scope

Key findings

## GLOBAL OVERVIEW

The industry saw stagnant growth with weakening financial viability

Global production remained dominated by China, the US and India

Costs eased in most countries on softening energy and raw material prices

Profitability softened despite easing production costs

Trade shifted to a lower growth environment with more frictions

Import demands driven by the packaging sector

Key trends shaping the forestry, wood and paper industry

Key trends uncovered

Macroeconomic/Industry trends

## LEADING COMPANIES

Higher market concentration in pulp, paper and paperboard than in wood and forestry

Number of companies declining amid consolidation and capacity rebalancing

Consolidation driving higher concentration

## COUNTRY SNAPSHOTS

China : Steady production growth expected until 2029

China: Strong growth upstream, consolidation downstream

USA : Sluggish growth in production value amid industry consolidation

USA: Wood demand, digitalisation and capacity rationalisation shape industry outlook

India : Solid rise in production capacity to meet growing domestic demand

India: Urbanisation and infrastructure development drive paper and wood demand

Germany : Gradual recovery expected amid trade and ongoing economic headwinds

Germany: Shifts in global trade and regulation shape industry future developments

Japan : Muted growth expected on lower demand and trade shifts

Japan: Sluggish demand, slowing trade and higher sustainability requirements

Canada : High exposure to the US market is a key challenge

Canada: Trade pressure, value shift and bioeconomy

Indonesia : Growing integration into the regional forestry, wood and paper supply chain

Indonesia: Scale, exports and sustainability transition

Brazil : Continued pulp mill investment and production growth

Brazil: Strong export growth, backed by sustainability compliance

Italy : Solid growth expected for both production and trade

Italy: European export hub for forestry, wood and paper industry

France : State-led investments drive steady growth

France: Regulation-led circular transformation

Definitions

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