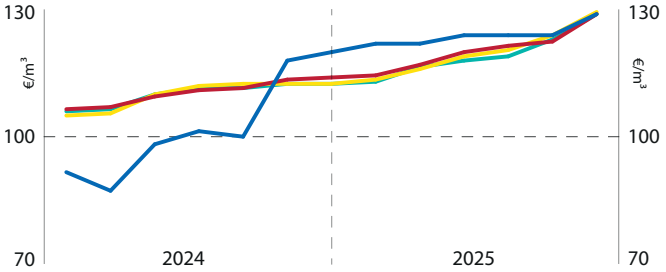
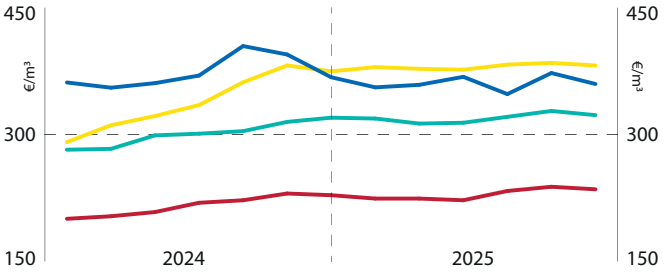
HOLZKURIER MONTHLY PRICE TRENDS November 2025

LOG WOOD	NOVEMBER 2025	TREND*
Austria [1]	€ 125–133 /m³	↑
Bavaria [2]	€ 128–131 /m³	↑
Baden-Württemberg [3]	€ 126–132 /m³	↑
Northern Germany [4]	€ 120–138 /m³	↔



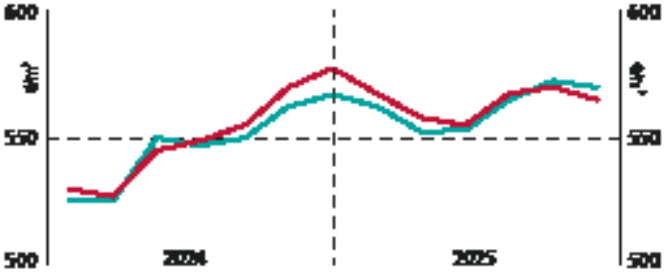
LUMBER	NOVEMBER 2025	TREND*
2-by-4 USA [5]	€ 350–370 /m³	↔
CE-roof slats [6]	€ 378–385 /m³	↔
Glulam lamella Germany [7]	€ 315–330 /m³	↔
Sideboards Italy [8]	€ 230–240 /m³	↔



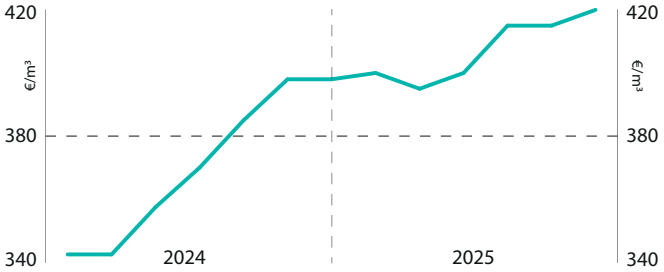
Log insights:
- Major price jump in November; prices now range from €125 to €133/m³, around €6/m³ above the October level.
- Latest price level €5/m³ higher than in October. Difficult weather conditions recently hampered log harvesting. Ground frost is hoped for.
- In November, the average log price was the same as in Bavaria and Austria.
- Further price increase in November brings the average price to €129/m³; price range remains wide. Replacement purchases from suppliers that are able to deliver continue across regions.

Lumber Insights:
- Price decreased by €13/m³ in November; falling prices due to weak US demand; inventory levels remain too high.
- Typical seasonal hesitancy to buy in timber trade; price levels expected to remain constant until the end of the year; completely divergent forecasts for the start of 2026.
- Central European glulam lamellas remain much more expensive than Scandinavian ones. However, some companies have adjusted their prices. Scandinavian prices expected to increase in Q1 2026.
- Price drop in November: -€3/m³.

GLULAM	NOVEMBER 2025	TREND*
Germany [9]	€ 555–575 /m³	↔
Italy [10]	€ 560–580 /m³	↔



SOLID STRUCTURAL TIMBER	NOVEMBER 2025	TREND*
Germany/Austria [11]	€ 410–430 /m³	↔

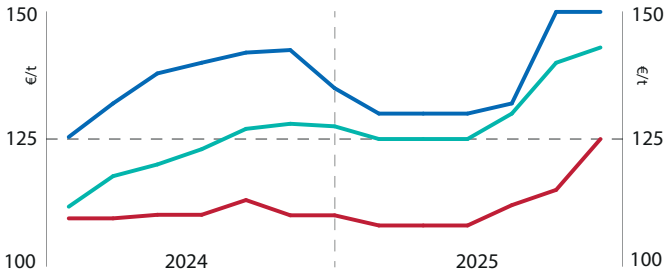


Glulam insights:
- Central European markets are becoming increasingly competitive; price concessions in November, despite high lamella prices.
- Price peaks could no longer be sustained. The average price fell by €2.5/m³ in November.

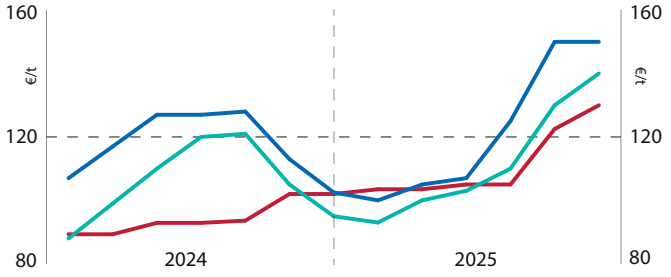
Solid structural timber insights:
- Slight increase in prices for finished product in November. Raw product under price pressure.
- Price differences less big recently. Prices in the north generally still higher than in the south.

***TREND:** The Holzkurier's editorial team expects the following price trends in the coming month: ↑upward ↓downward ↔unchanged, Source: Holzkurier market survey | © Holzkurier 2025

WOOD CHIPS	NOVEMBER 2025	TREND*
Austria [12]	€ 115–135 /t	↔
Southern Germany [14]	€ 130–150 /t	↔
Northern Germany [15]	€ 140–160 /t	↔



SAWDUST	NOVEMBER 2025	TREND*
Austria [13]	€ 115–145 /t	↔
Southern Germany [14]	€ 130–150 /t	↔
Northern Germany [15]	€ 140–160 /t	↔



Wood chip insights:

- Reduced cutting due to a shortage of log wood is driving up prices for sawmill by-products. Capacities for wet milling of wood chips for pellet production is a limiting factor in some cases.
- In southern Germany, the price range of €130 to €150/t for dried wood chips remained unchanged in November. The majority of contracts involve €140 to €150/t (dry weight).
- The upper price limit for dried wood chips remains unchanged at €160/t.

Sawdust insights:

- Sawdust more expensive than wood chips (price range in November: €115 to €145/t for dried sawdust).
- In November, prices were higher in southern Germany. Pellet plants there have limited milling capacity, resulting in a greater reliance on sawdust than in the north.
- In northern and eastern Germany, the potential recommissioning of the Heidegrund pellet plant is being discussed. A major issue would be its supply, given the lack of readily available sawmill by-products.

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LOG WOOD:
1 Spruce logs, B, 2b
2 Spruce logs, B, 2b (small share of C-grade logs)
3 Spruce logs, B, L2b (Bavaria, Baden-Württemberg)
4 Spruce logs, B, L2b (Brandenburg, Hesse, Mecklenburg-Western Pomerania, Lower Saxony, North Rhine-Westphalia, Rhineland-Palatinate, Saxony-Anhalt, Saxony, Schleswig-Holstein, and Thuringia)

LUMBER:
5 USA E-SPF East Coast (actual size)
6 CE roof slats, Germany, Austria
7 Glulam lamellas, dry (carriage paid)
8 Machined sideboards (delivered to Milan, 17–21 x 95–115 mm)

GLULAM:
9 bulk quantities only, carriage paid to customer
10 bulk quantities only, delivered to Northern Italy

SOLID STRUCTURAL TIMBER:
11 6 by 8 cm bar goods; non-visible quality; large quantities

WOOD CHIPS/SAWDUST:
12 Conversion factor €/m³ to €/t of dried wood chips/sawdust: 7.4
13 Conversion factor €/m³ to €/t of dried wood chips/sawdust: 7.2
14 Southern Germany (Bavaria, Baden-Württemberg)
15 Northern Germany (Brandenburg, Hesse, Mecklenburg-Western Pomerania, Lower Saxony, North Rhine-Westphalia, Rhineland-Palatinate, Saxony-Anhalt, Saxony, Schleswig-Holstein, and Thuringia)



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