



**AMERICAN
HARDWOOD
EXPORT
COUNCIL**

Global Update for US Hardwoods



American Hardwood Assured



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Agenda

Export Markets
& AHEC Activities

—

European Union Deforestation
Regulation (EUDR)

—

American Hardwood Assured
now fully EUDR Compliant



PROMOTE OUR SUSTAINABLE
RESOURCE



INFLUENCE SPECIFIERS



PROMOTE NEW SPECIES &
APPLICATIONS



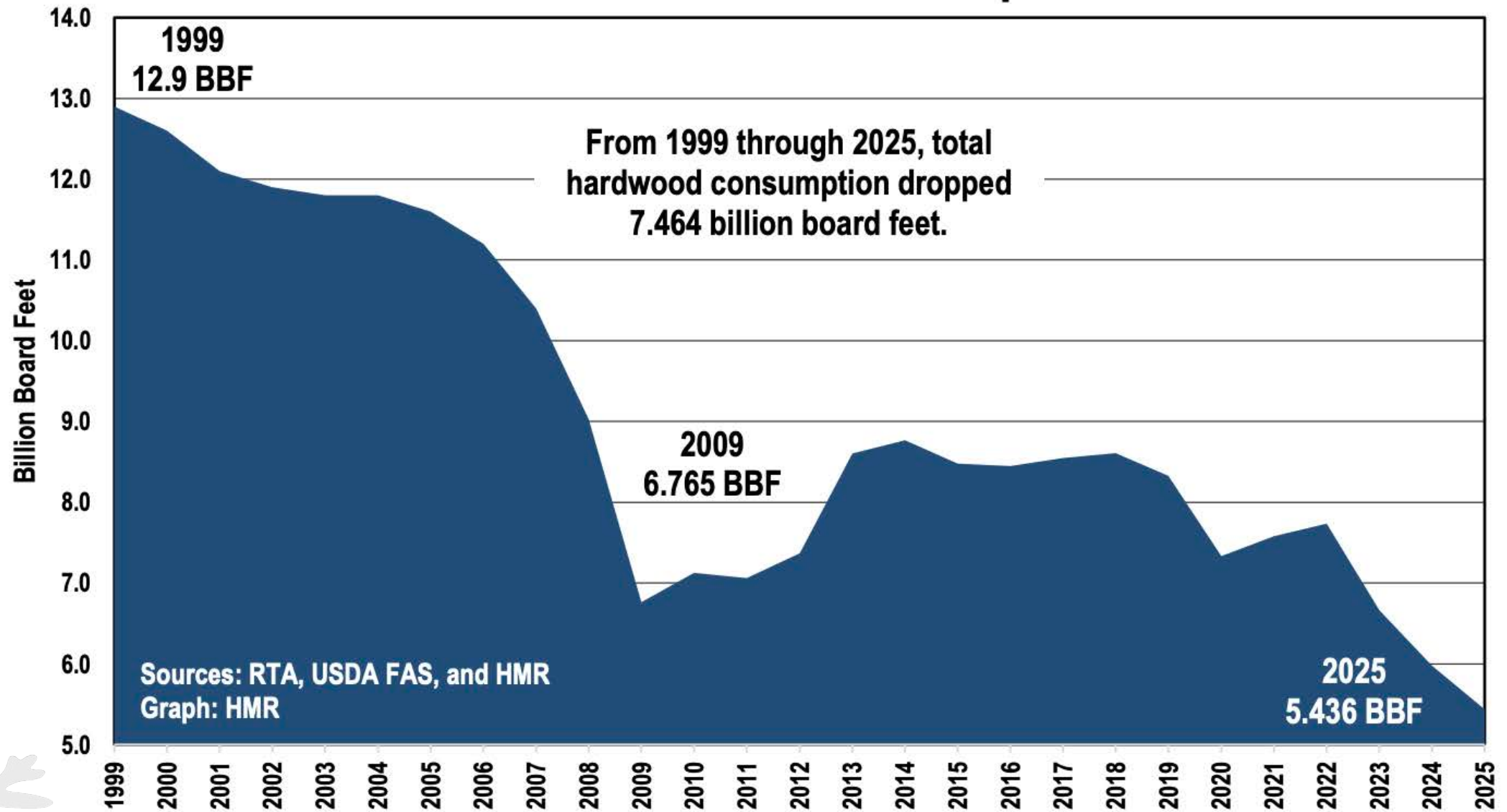
MAKE
CONNECTIONS



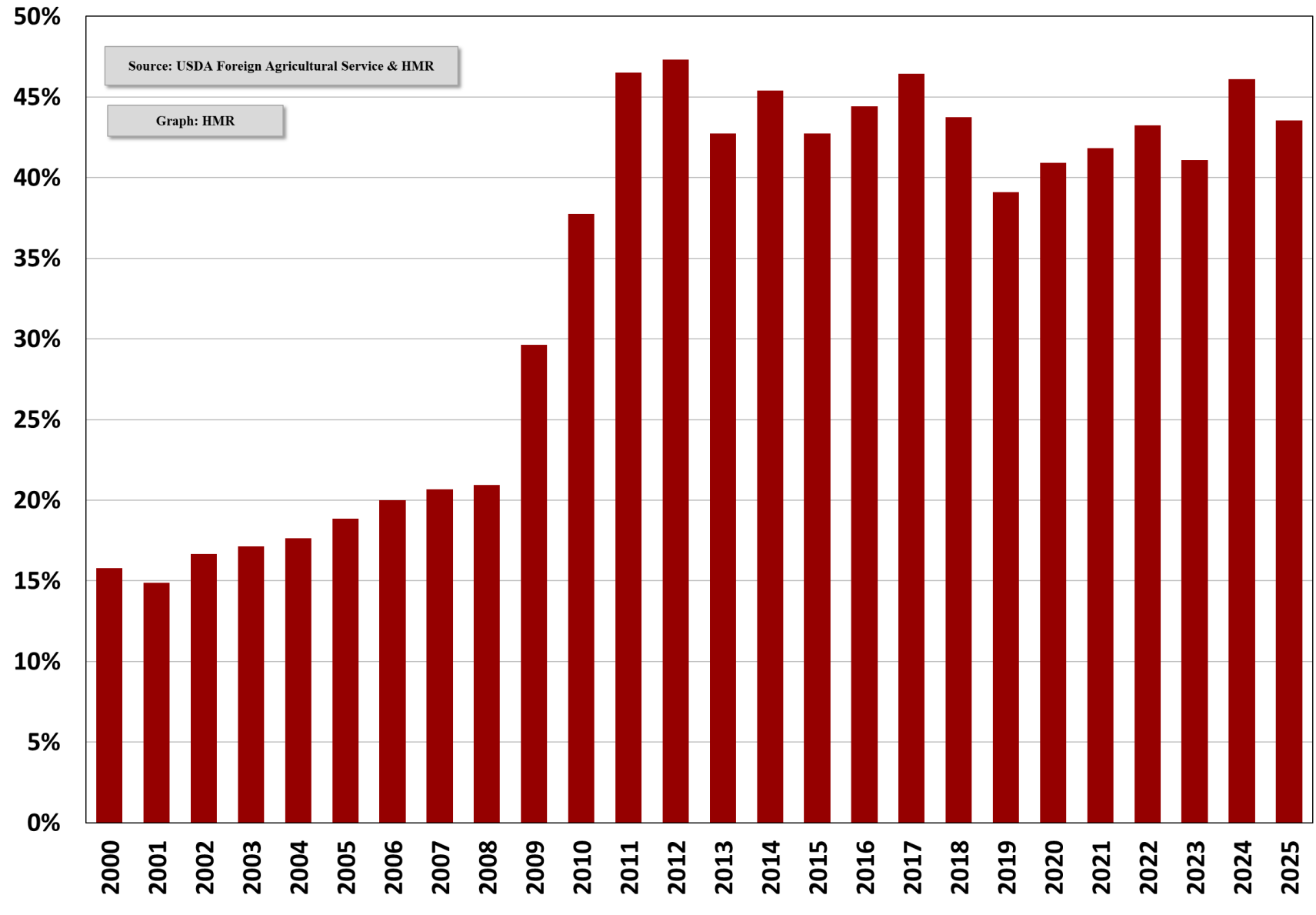
Why Exports Matter



Total Hardwood Consumption

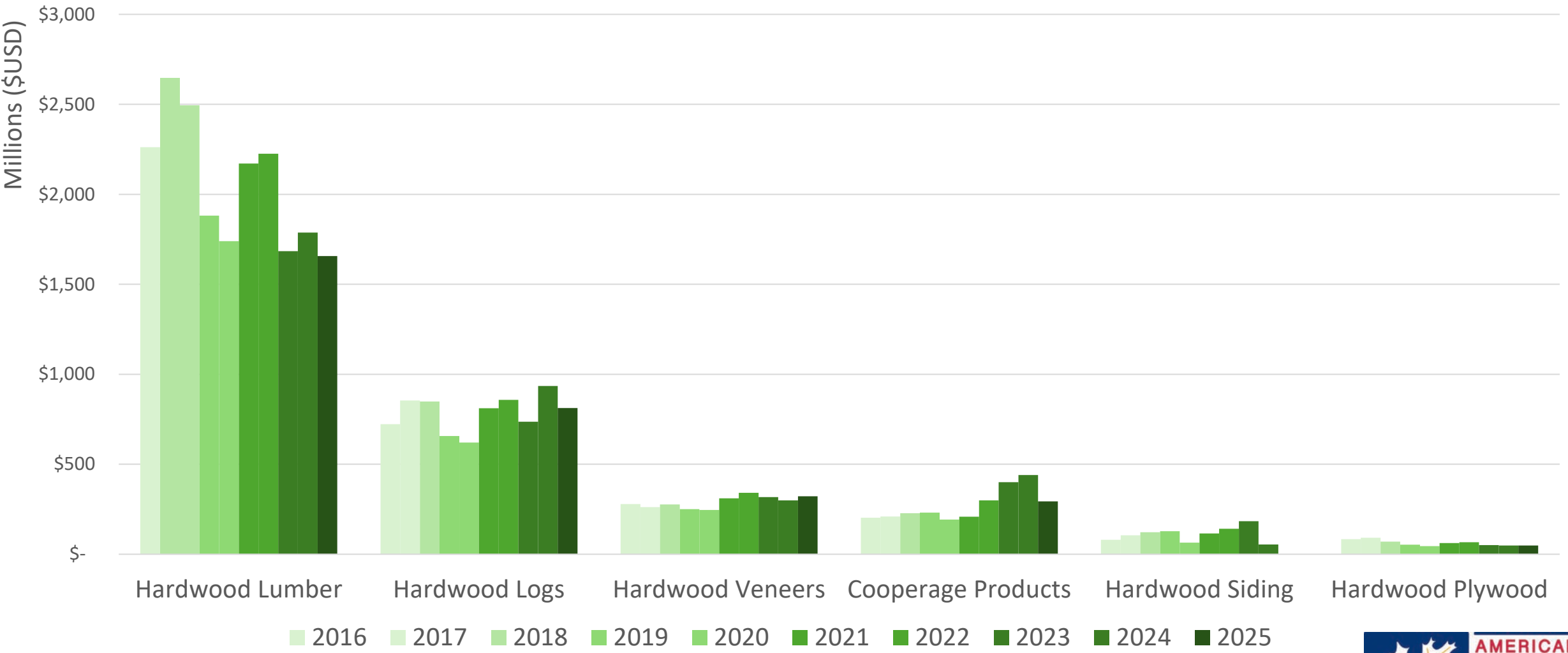


Exports' Share of Total Grade Lumber Consumption



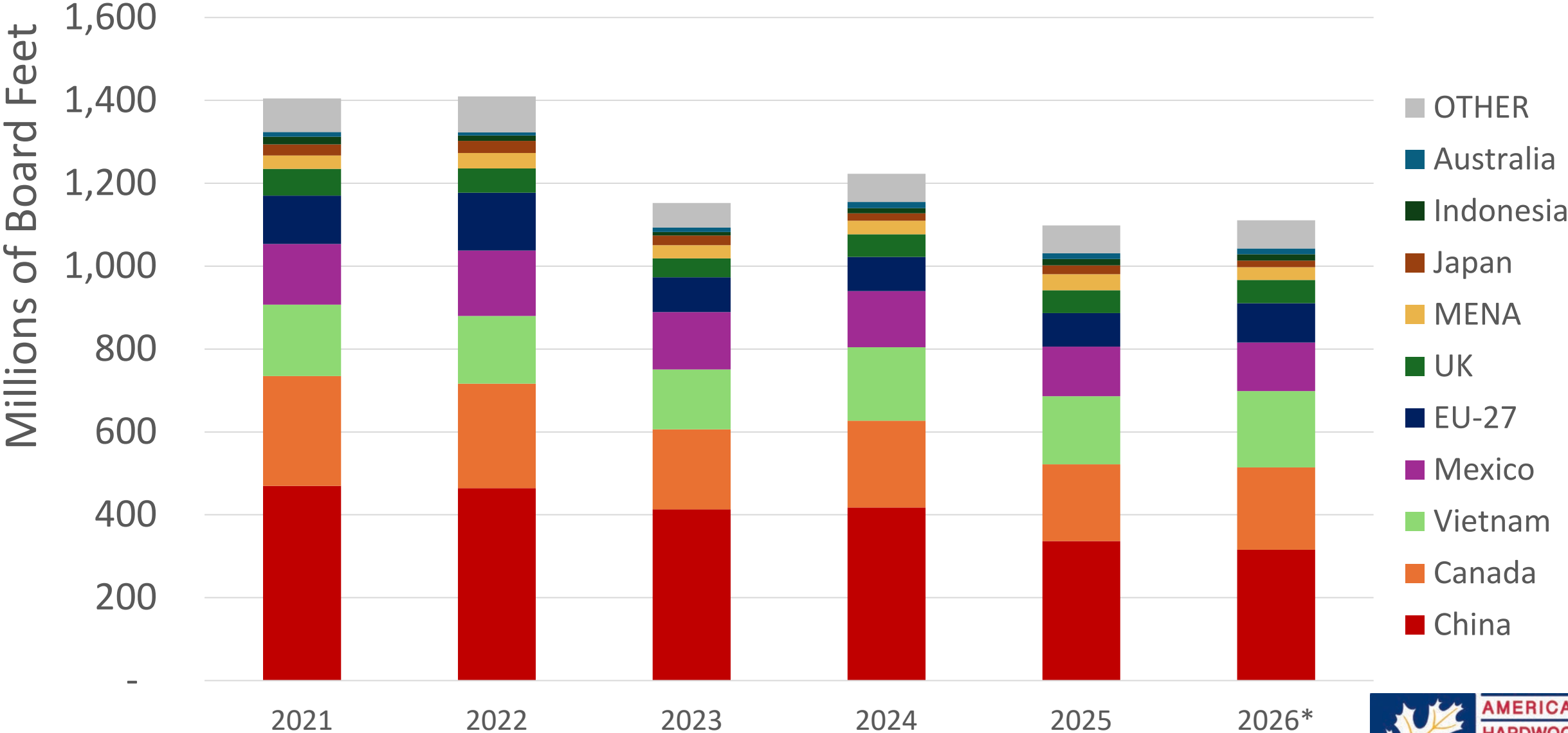
Exports of US Hardwood Products

2016 - 2025



Source: U.S. Census Bureau Trade Data

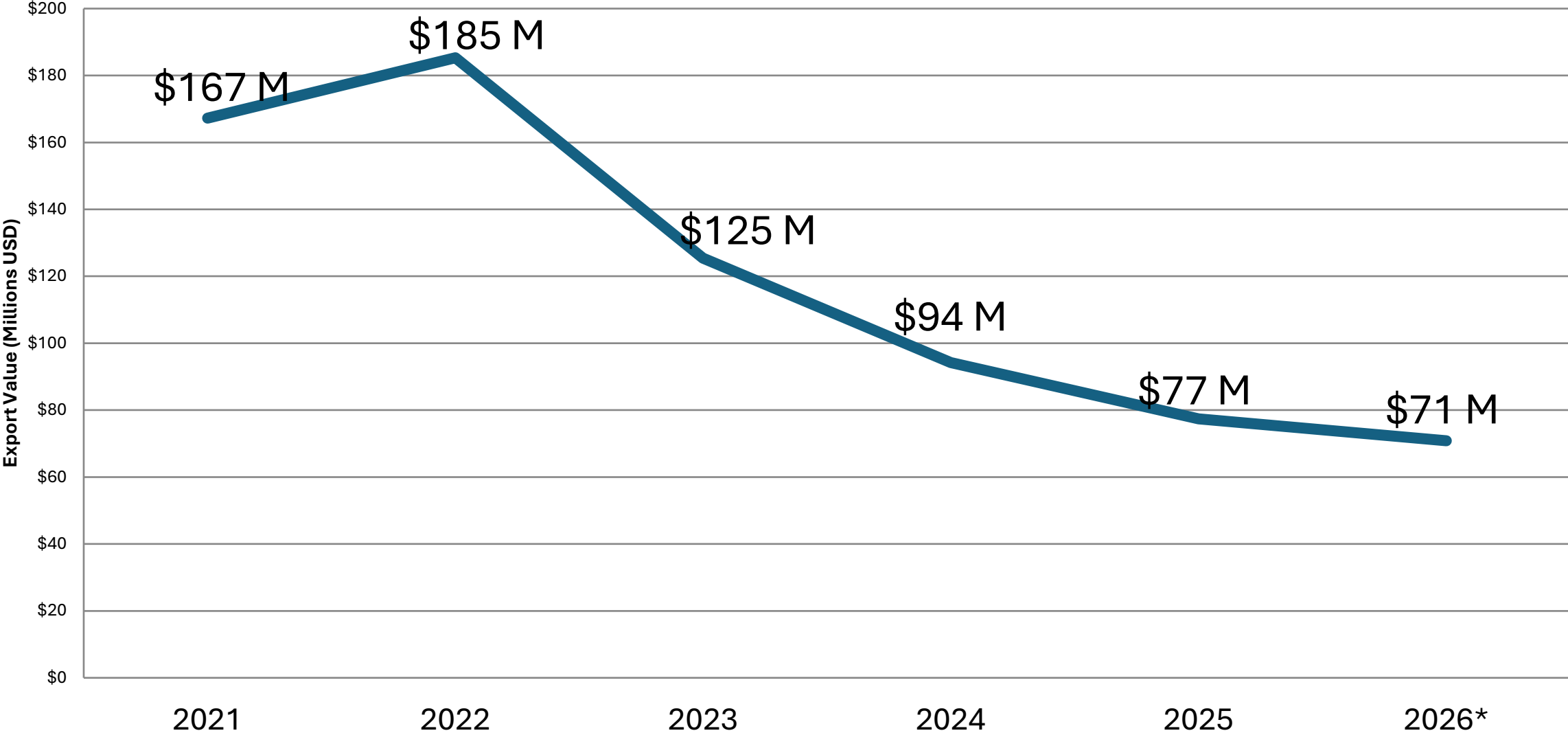
US Hardwood Lumber Exports



Source: U.S. Census Bureau Trade Data, 2026 Annualized from Jan-May Data



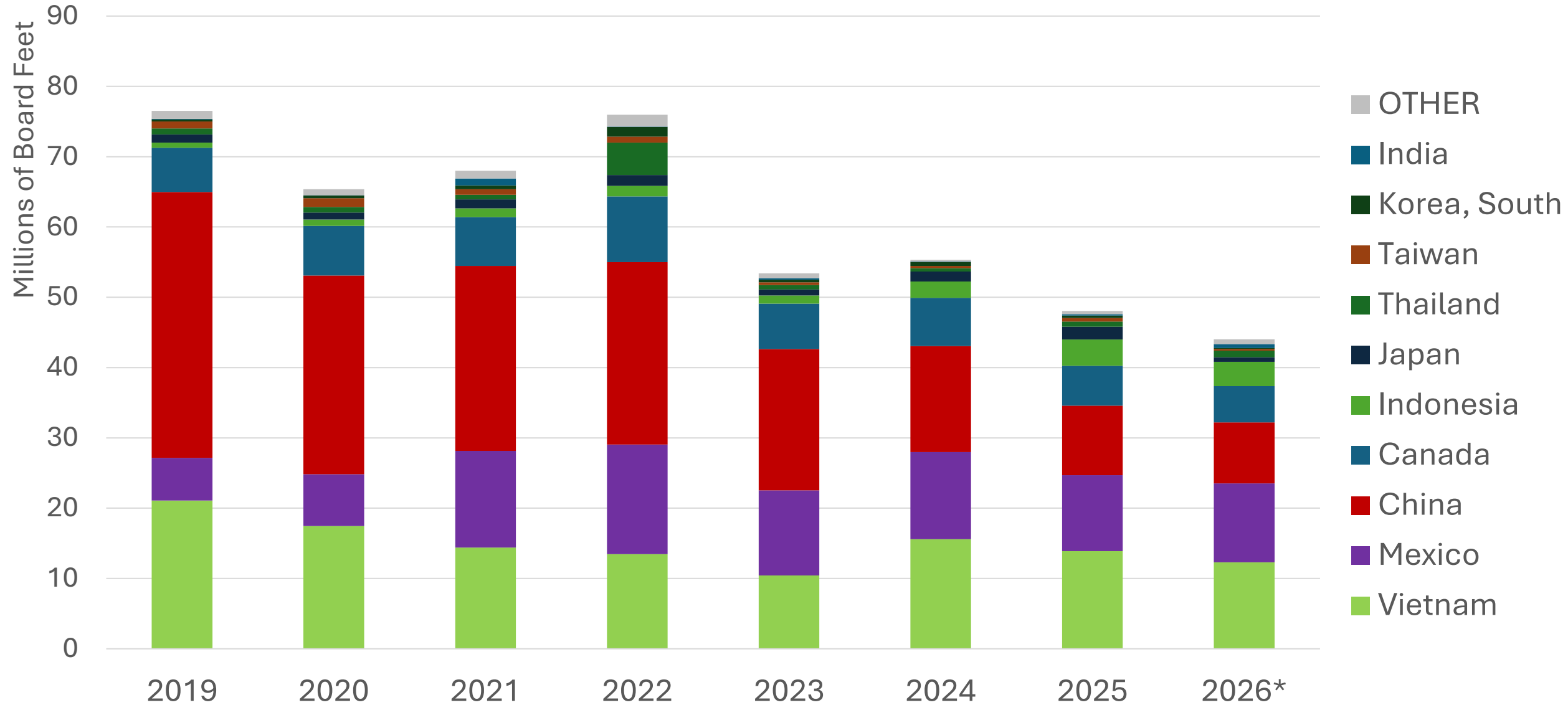
Western US Hardwood Exports Trend



Source: U.S. Census Bureau Trade Data, 2026 Annualized from Jan-June Data



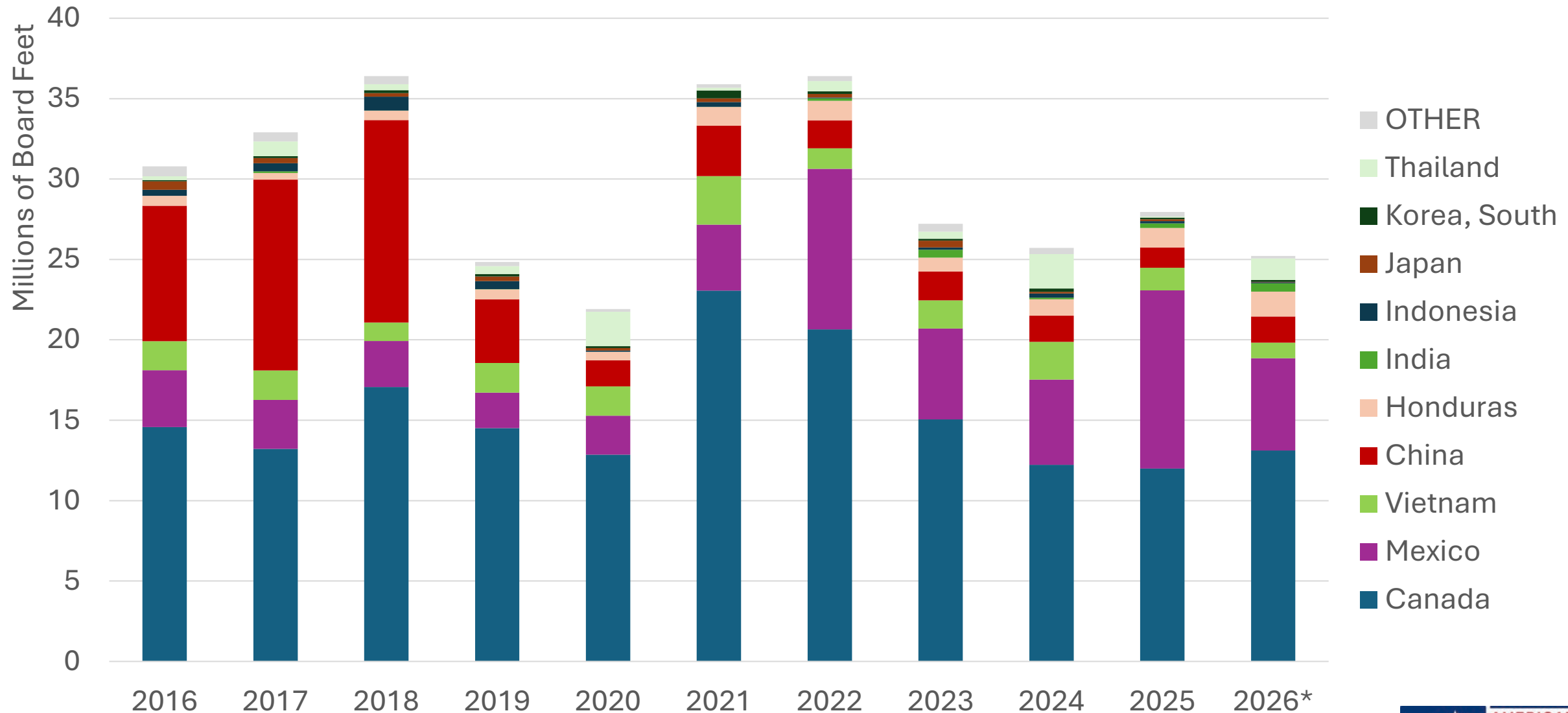
Western Red Alder Exports (board feet)



Source: U.S. Census Bureau Trade Data, 2026 Annualized from Jan-June Data



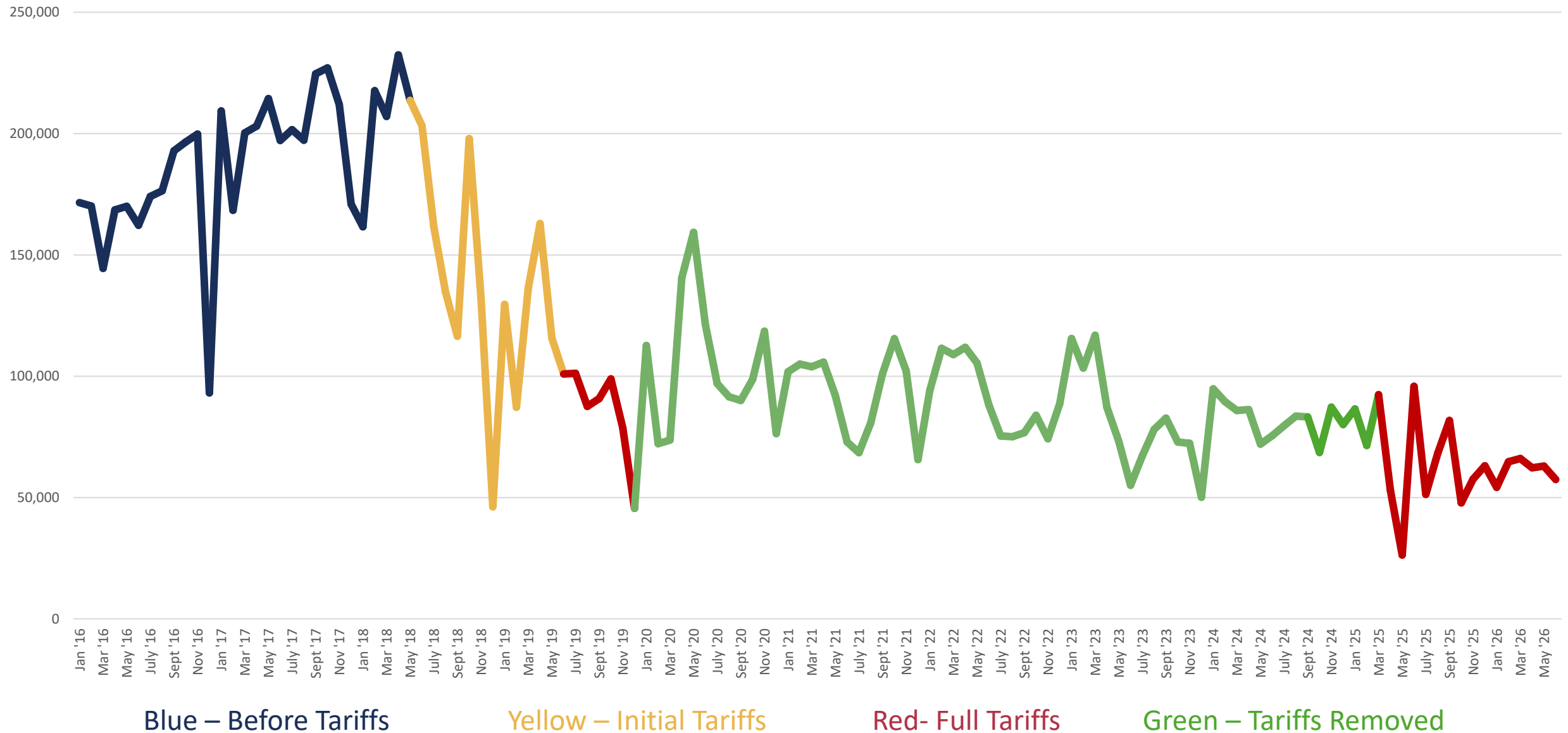
Soft Maple Exports (board feet)



Source: U.S. Census Bureau Trade Data, 2026 Annualized from Jan-June Data



US HDWD Lumber Exports to China (m3)



Source: U.S. Census Bureau Trade Data. Initial tariffs of 5% in June 2018, full tariffs up to 25% in June 2019, Tariffs Removed Jan 2020, 10% tariffs in April 2025



AHEC Greater China

Interzum Guangzhou

March (27 members joined)



AMERICAN HARDWOOD EXPORT COUNCIL

QIFF Qingdao

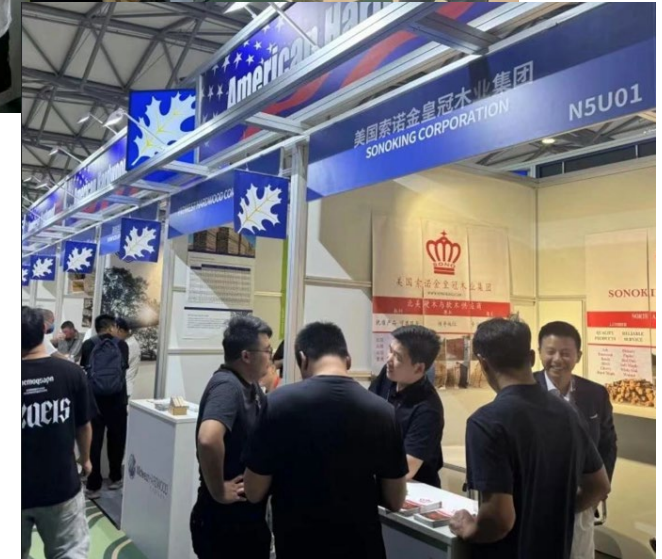
May (18 members joined)



Trade Shows

FMC Premium Shanghai

September 8-11 (18 members)



Echoes of the Woods Design Project



AMERICAN
HARDWOOD
EXPORT
COUNCIL

AHEC Greater China

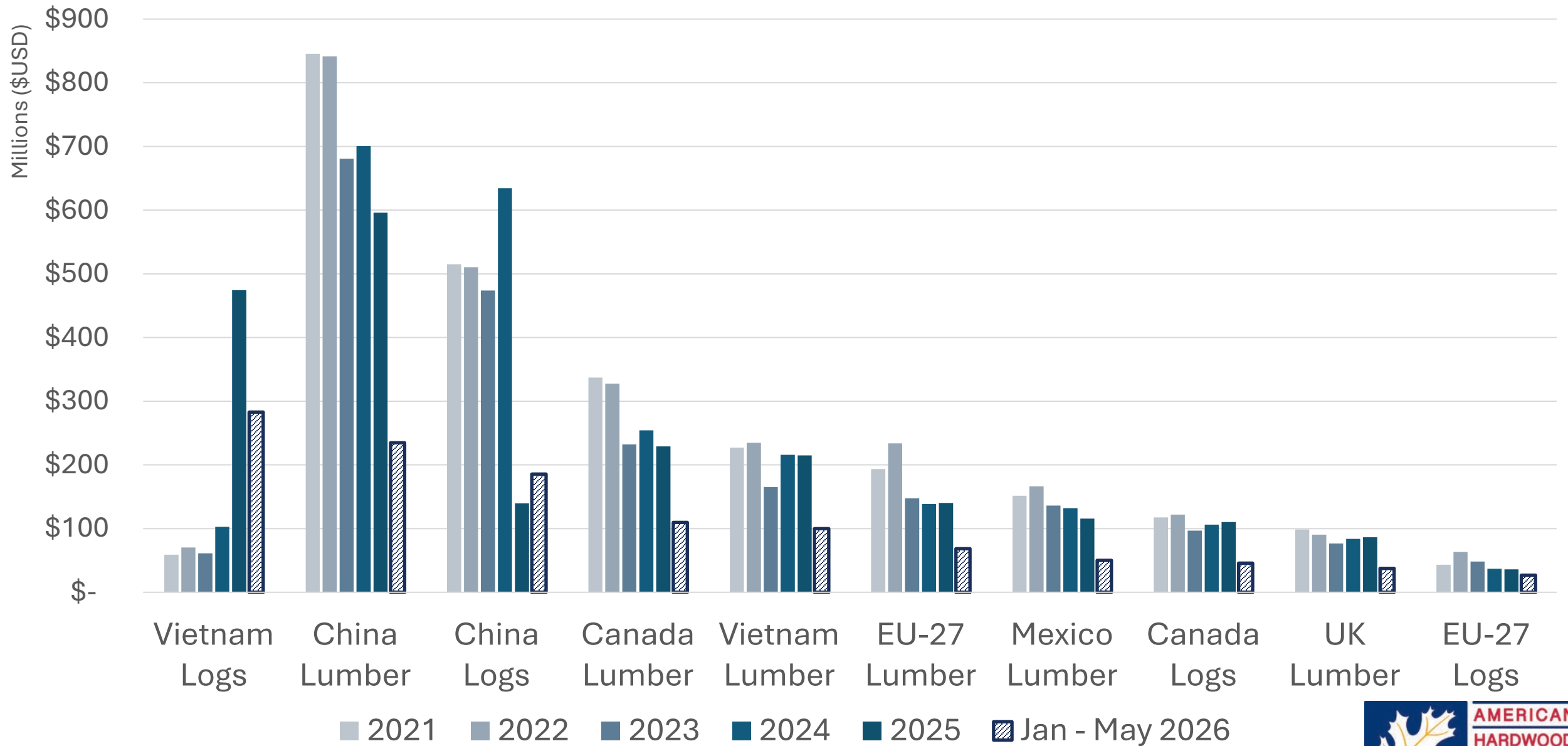
Echoes of the Woods at Maison Shanghai



Over 47K visitors attended. Visitors were mainly from design related industry



Top 10 Markets for Hardwood Logs and Lumber



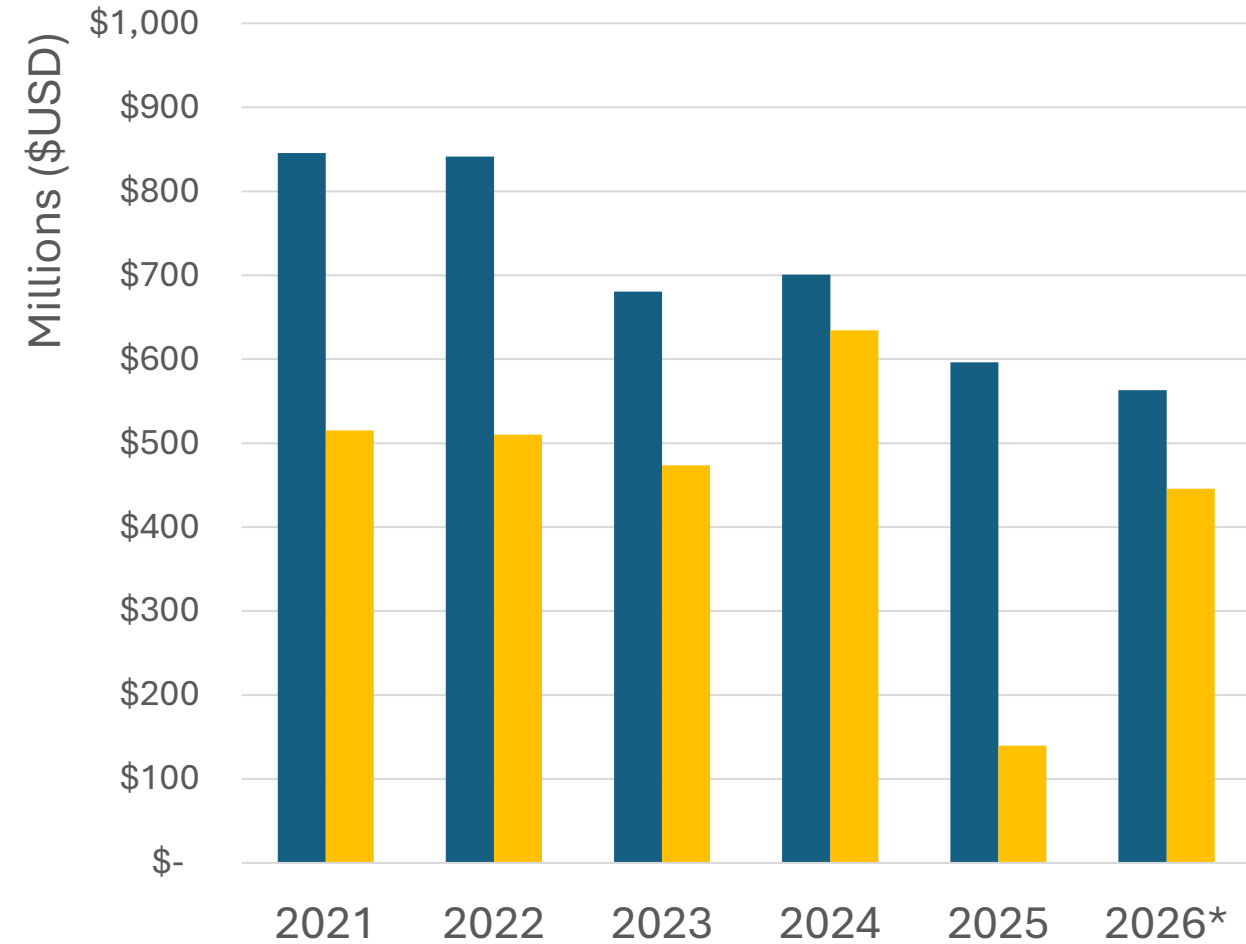
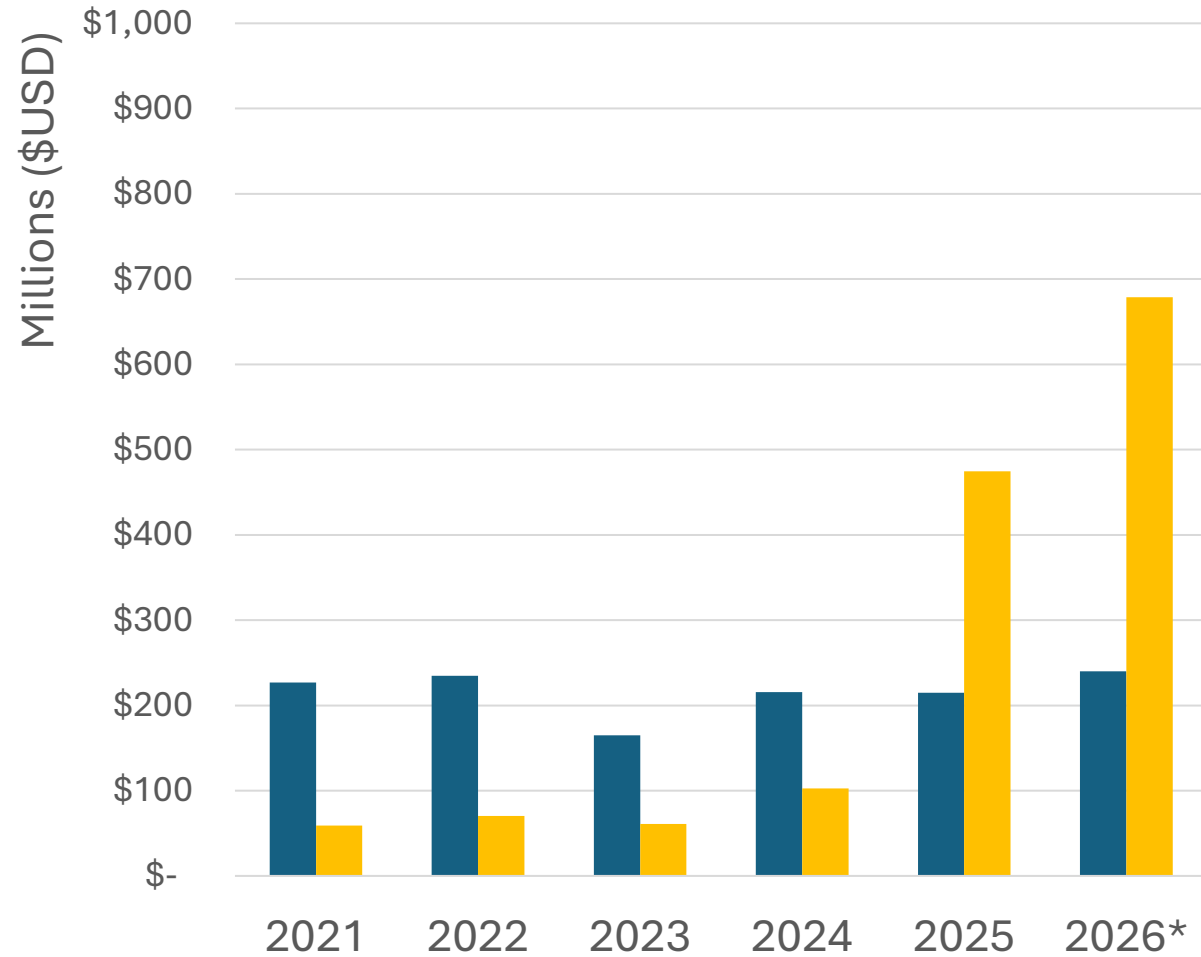
Source: U.S. Census Bureau Trade Data



US Hardwood Lumber & Logs Exported to:

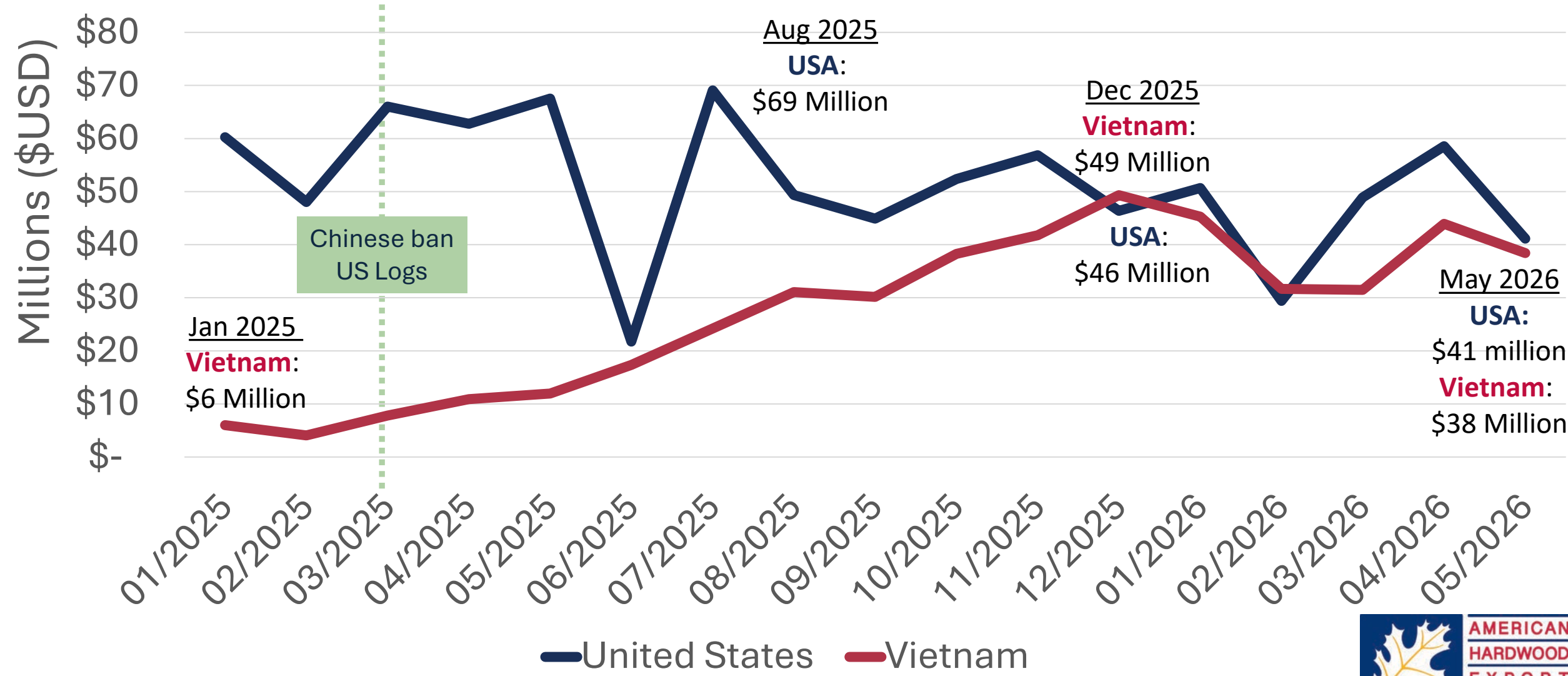
Vietnam

China



China Lumber Imports from **USA** and **Vietnam**

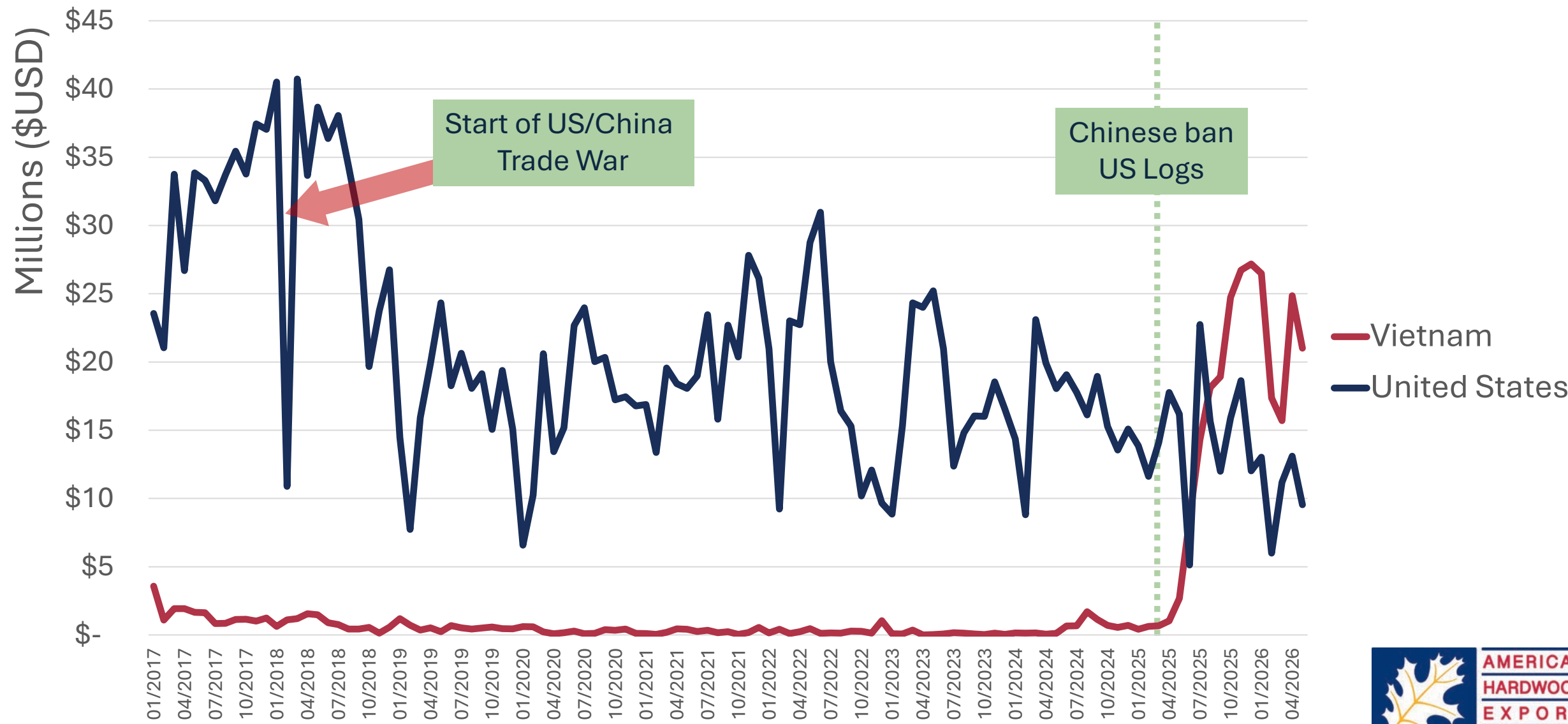
Since 2025



Source: Trade Data Monitor, China imports of all hardwood lumber by value



China Imports of **440799** (inc. Walnut) Lumber Monthly, Jan 2017 to May 2026



Source: U.S. Census Bureau Trade Data



AHEC SE Asia Convention in Vietnam March 25, 2027

Right before Interzum
Guangzhou trade show
(March 28-31)



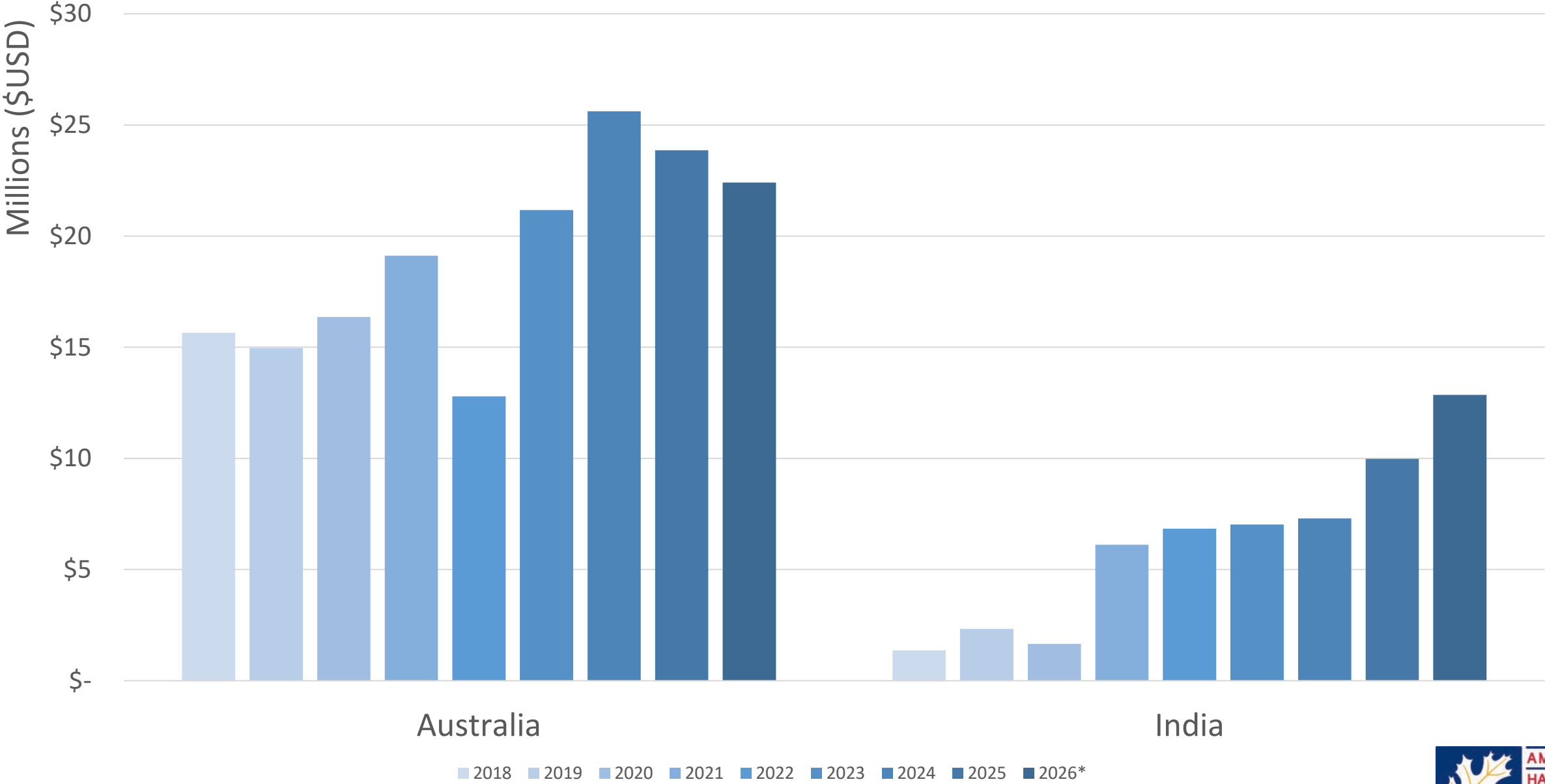
TIWF Bangkok

September 16-18, 2026

Pavilion with 12 members



US Hardwood Lumber to Australia and India



Source: U.S. Census Bureau Trade Data, 2026 Annualized from Jan-June Data



Moving with Grain: Aussies and Indians Love American Hardwoods

New exhibit comes as volumes of American red oak, cherry and maple climb in both countries.

 **WOOD CENTRAL**
THU 19 SEP 24



It was through AHEC that we could confront some of our misconceptions and biases around the use of non indigenous species of hardwood. The expertise and knowledge about timber standards and woodworking processes that came along with the collaboration have been deeply educational. Through the development of the collection, we were able to quickly delve into the uncharted subject of wood bending and building forms and structures with them. Armed with Adam’s proactive, rigorous, and patient insights we have been able to expand the range of our hand-crafted techniques and design language.

Aparna Rao, CoFounder, Phantom Hands.

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Exhibition of *KEEP* design collaboration in Australia

Six Australia architects were challenged to design a long-lasting object to be made from American cherry, maple or red oak

September 2025





Re-editions exhibition at Design Mumbai

Working with Indian maker, Phantom Hands, AHEC showed 8 pieces of furniture all made from American cherry and red oak in a purpose-built pavilion made from American hard maple.

November 2025



INDIA



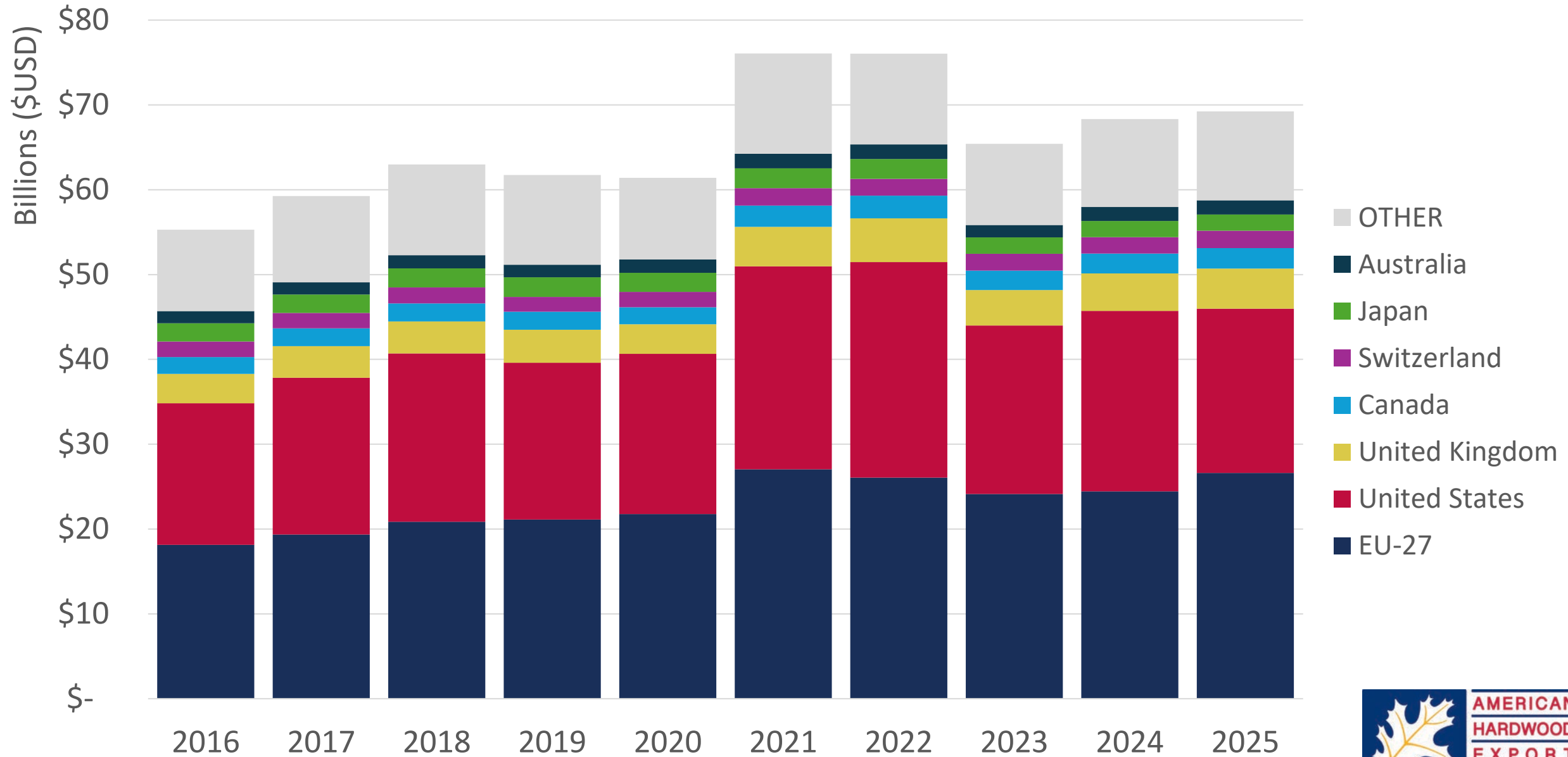
- Pavilions at IndiaWood Bangalore and Kolkata Wood show
- Seminar for manufacturers at Indian Handicraft & Gifts Fair (Delhi) with Adam Markowitz
- Factory visits in Delhi & Bangalore
- Seminars on American Hardwood Assured





European Union Deforestation Regulation (EUDR)

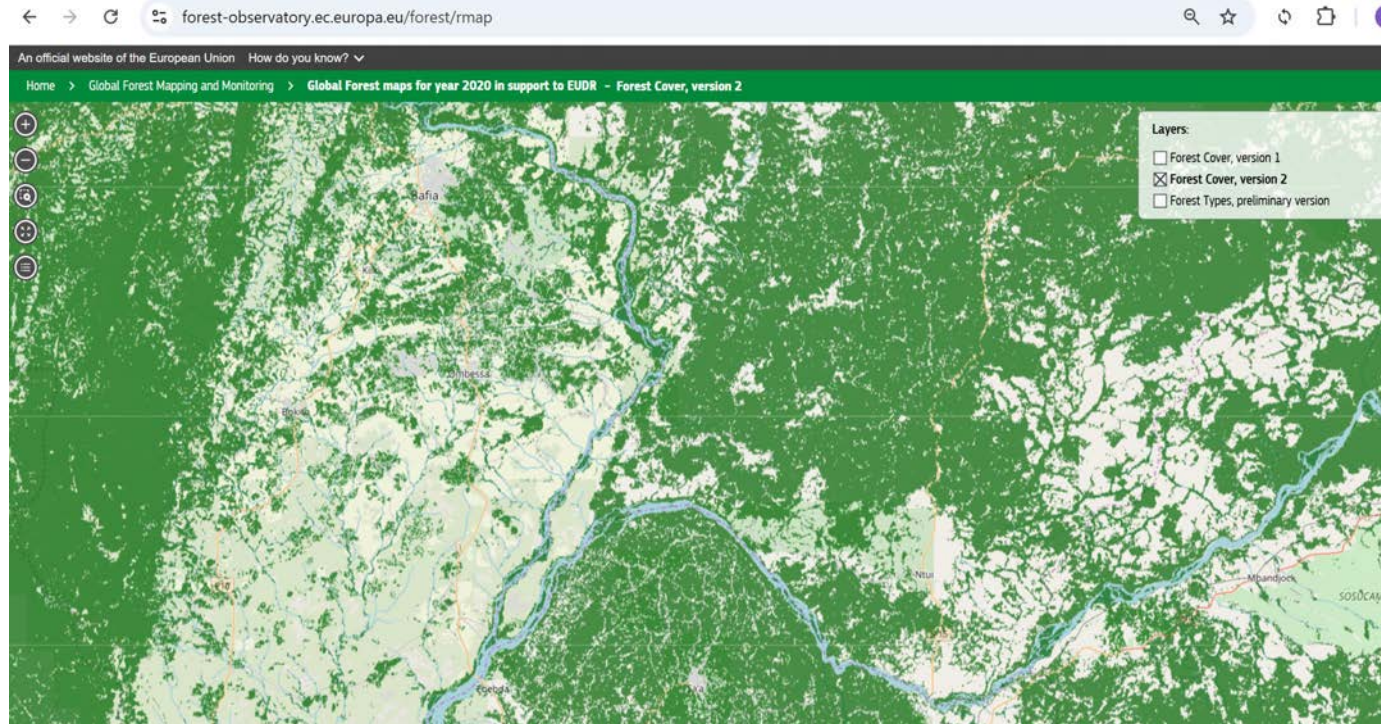
Wooden Furniture Imports



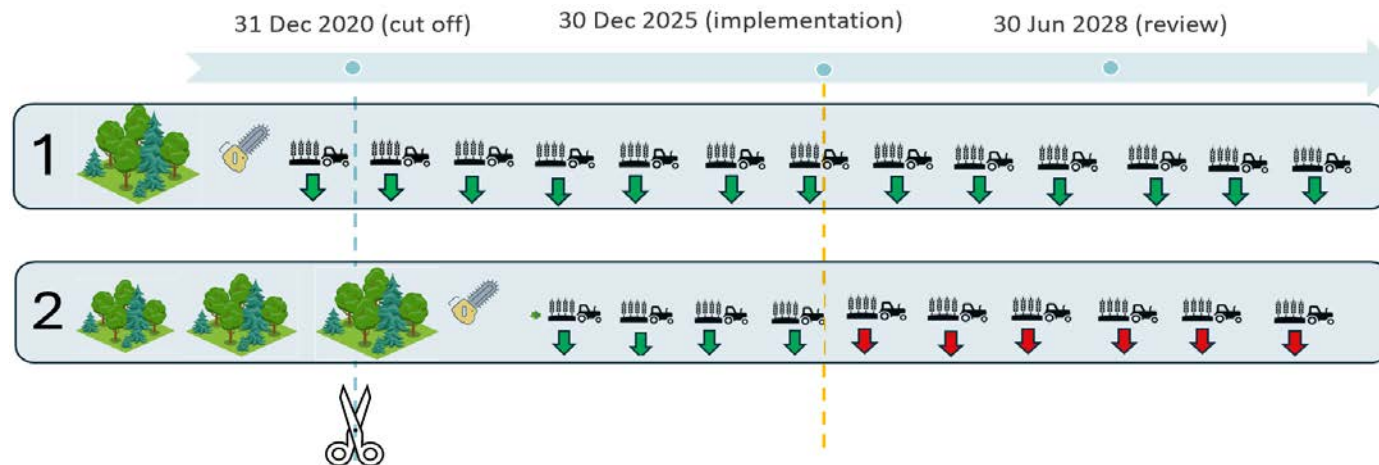
Source: Trade Data Monitor,



The BIG IDEA behind EUDR



- Trace all Ag products back to a “plot of land”
- Products coming from land that was a forest on Dec 31 2020 and now is an agricultural field cannot be placed on or exported from EU market after 30 Dec 2026
- Will use scientific testing like World Forest ID to audit
- Importer fined **4% of annual turnover**



EUDR strengths and challenges

Strengths

- Targets driver of 90% of global deforestation: Conversion to Agriculture
- Uses new technology to address deforestation and illegal logging
- Not tied to Certification

Technical challenges

- Over-estimates access to technology & data, particularly by SMEs
- Under-estimates supply chain complexity
- Poorly adapted to forest products
- Failure to understand time factor – conversion only becomes apparent several years after wood harvest
- Strict definition requires more data than the TRACES system can accept

Major Issues for US Hardwoods

- “Plot of Land” definition discriminates against smallholders
- EU operators not held to same standard in global supply chain
- EU Tracking cannot determine exact plot of land



Small scale hardwood harvesting

- 90% Private Landowners
- Typically harvesting once in a generation
- 11 million forest owners
- Less than 4% of family forest owners are certified
- US hardwood mills purchase from hundreds of landowners each year



US hardwood supply chain

U.S. hardwood sawmill

- Logs from ~100-mile radius
- 200-300 harvest sites per year distributed across several 100k properties
- Logs sorted by species, size, grade
- Further sorts after sawing & drying



U.S. hardwood exporter

- Purchases from ~80-100 mills
- Several million forest properties
- Distributed across several states
- Further mixing & sorting to match customer specs



**16k to 30k
potential
harvest sites
for each
consignment**

The Team Behind AHA



Rupert Oliver

Environmental Policy Director,
AHEC. Over 30 years experience
consulting for Government policy
and private businesses



George White

Former Director of Global Timber
Forum, Consultant for FLEGT and
WWF's Forest & Trade Network



Ben Gunneberg

Former CEO of PEFC for over 20
years, Chair of the UK Woodland
Assurance Standard

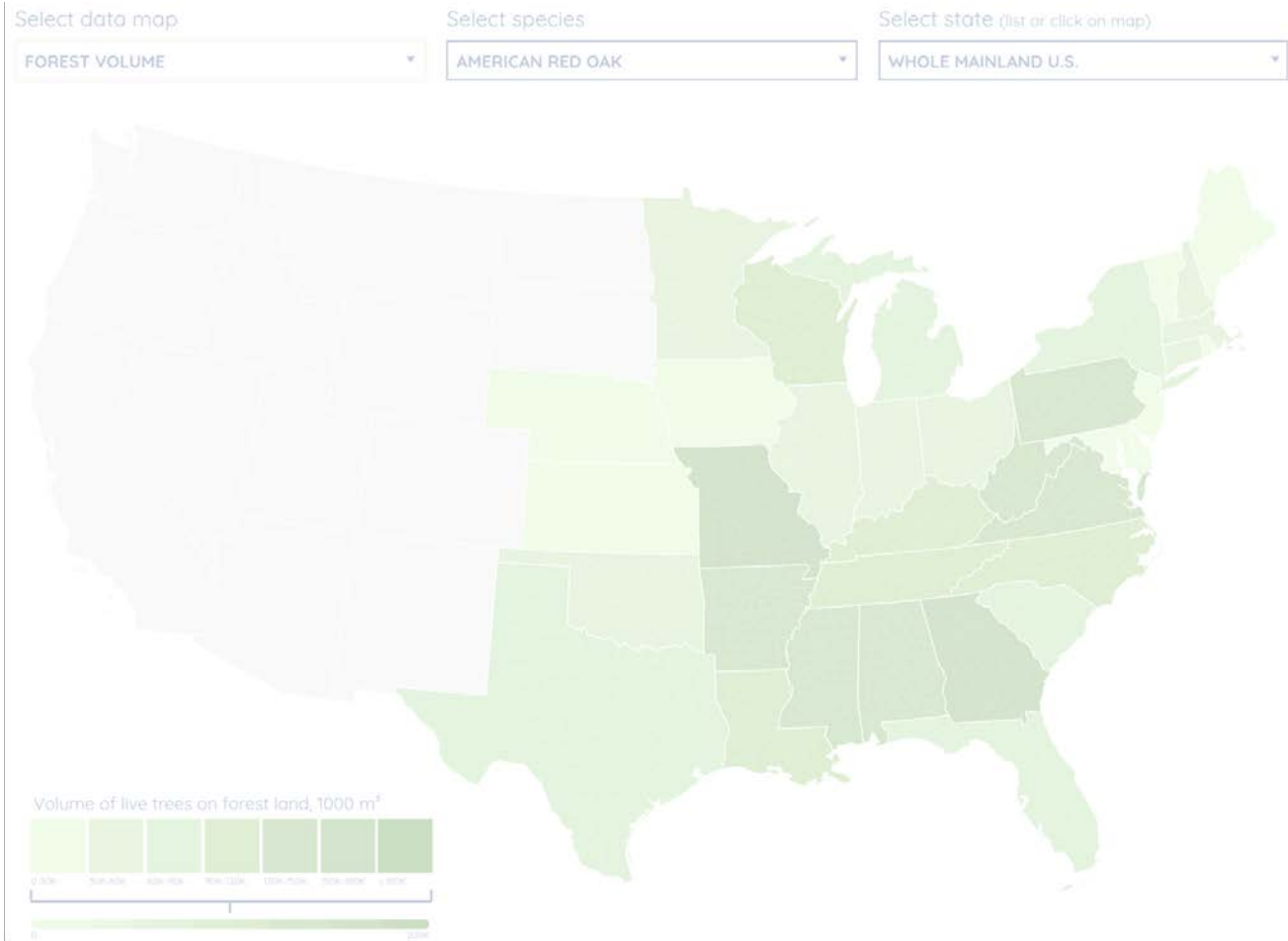




- Uses satellite mapping and AI to track forest change and detect deforestation under EUDR and FAO (UN) definitions
- For **hardwood** products (logs, lumber, veneer, etc.) from USA
- Exporters can select the **counties** they source from, and harvest site GPS data is automatically created
 - Data is in **GeoJSON format required by EU's TRACES system**
- Includes due diligence risk statements for illegal harvest/deforestation
- **FREE TO USE FOR US COMPANIES**



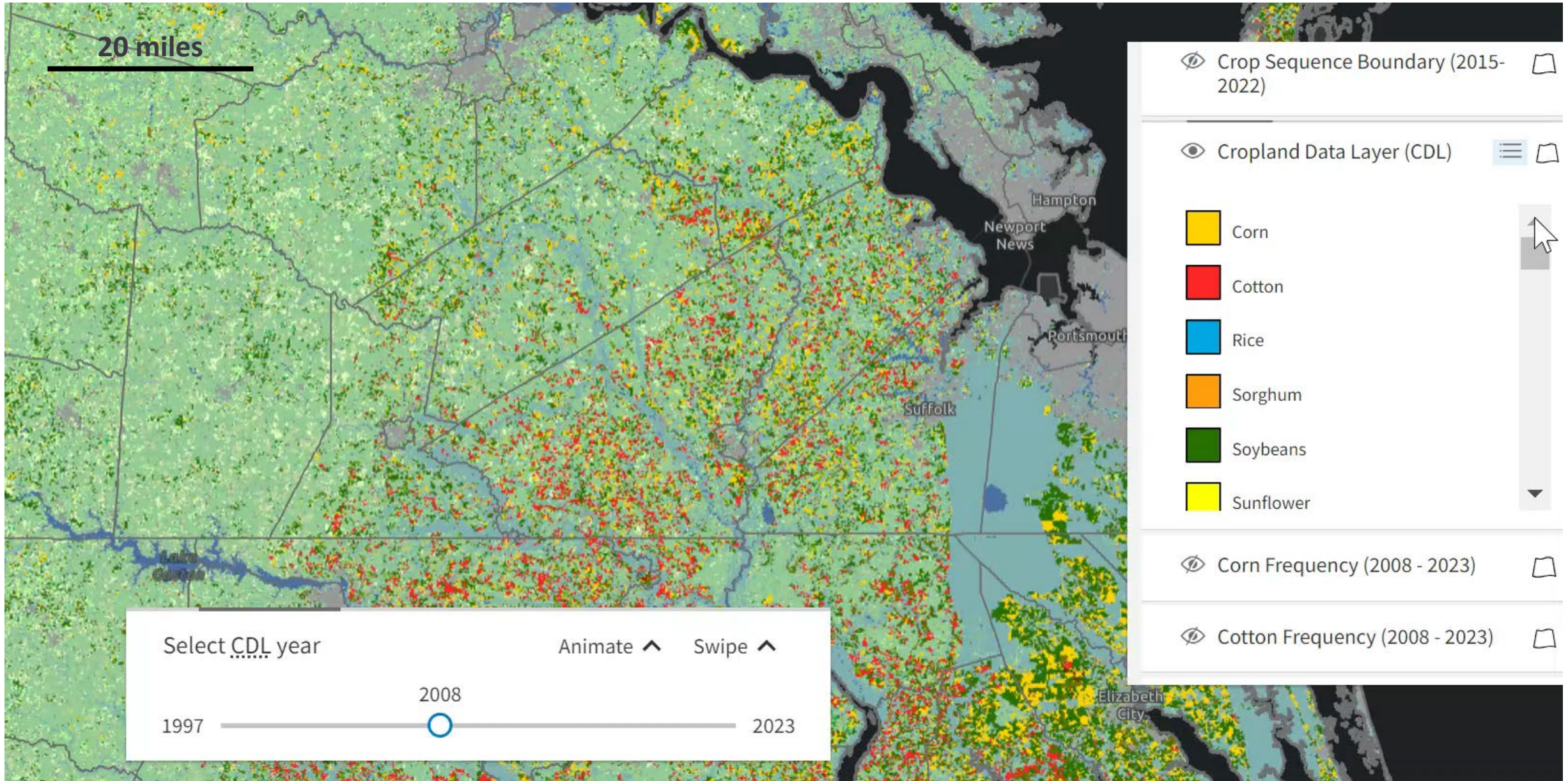
VOLUME, GROWTH
AND REMOVALS OF
ALL SPECIES AT A
STATE AND COUNTY
LEVEL



Access the map online



USDA Cropland Data Layer:





HOW THE AHA PLATFORM IDENTIFIES THE GEOLOCATION OF HARDWOOD HARVESTING SITES

The AHA Platform uses multiple sources of earth observation data and advanced analytics to detect and confirm hardwood harvesting activity.

1

DEFINE FOREST
BASE LAYER



Start with the revised 2020 JRC forest base layer to identify existing forest areas.

2

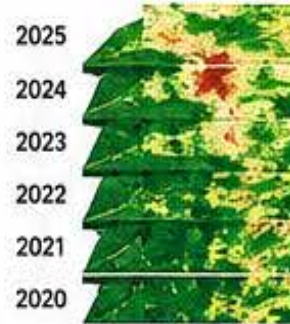
MONITOR FOREST
HEALTH & CHANGE



Calculate NDVI (Normalized Difference Vegetation Index) from red and near infra-red channels to measure healthy canopy.

3

DETECT CHANGE
OVER TIME



Year-on-year NDVI changes identify forest thinning, low intensity harvesting, and clear fell areas.

4

CORROBORATE WITH
MULTIPLE DATA
SOURCES



Cross-validate detections using independent earth observation datasets.

5

EXPERT VALIDATION
(AHA EXPERT EYE)



AHA foresters review high-resolution imagery and data to confirm harvest activity and exclude other causes.

6

HARVEST SITE
GEOLOCATION



Confirmed harvest areas are geolocated and made available to AHA Platform users for due diligence and EUDR compliance.



MULTIPLE EARTH OBSERVATION DATA SOURCES

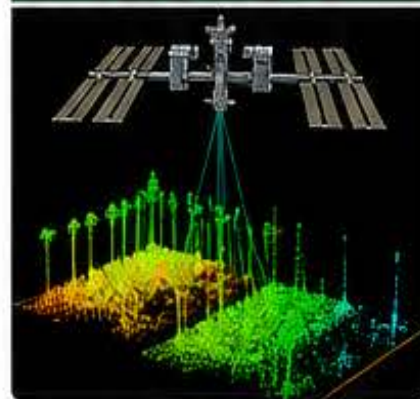
SENTINEL-2 NDVI (10 m resolution)



Low NDVI  High NDVI

NDVI measures vegetation health and density. Changes over time reveal harvesting intensity from thinning to clear fell.

NASA GEDI LIDAR (25 m footprint)



Measures 3D forest structure and canopy height to detect biomass loss and structural changes not visible in imagery.

ESA CCI BIOMASS (100 m resolution)



Provides above-ground biomass estimates to quantify biomass loss and distinguish harvesting from non-forest conversion.

FOREST PERSISTENCE LAYER (Forest Data Partnership)



 Persisted Forest (remained forest)
 Non-persistent (forest loss)

Identifies areas that have remained continuously forested over time to help confirm harvesting vs. permanent forest conversion.

INTEGRATED ANALYSIS WORKFLOW

1. DATA INTEGRATION



All datasets are spatially aligned within the 2020 forest base layer.

2. CHANGE DETECTION



Algorithms detect significant drops in NDVI and biomass indicators year-on-year.

3. CROSS-VALIDATION



Signals are corroborated across NDVI, LIDAR, biomass, and persistence data.

4. EXPERT REVIEW



AHA foresters apply the Expert Eye to confirm harvests and refine classifications.

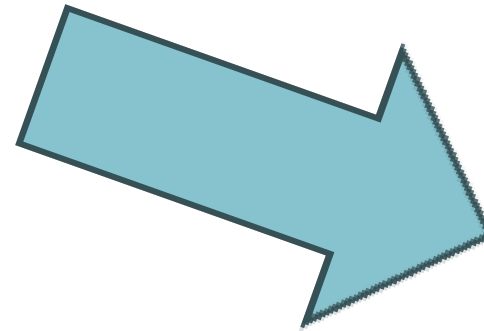
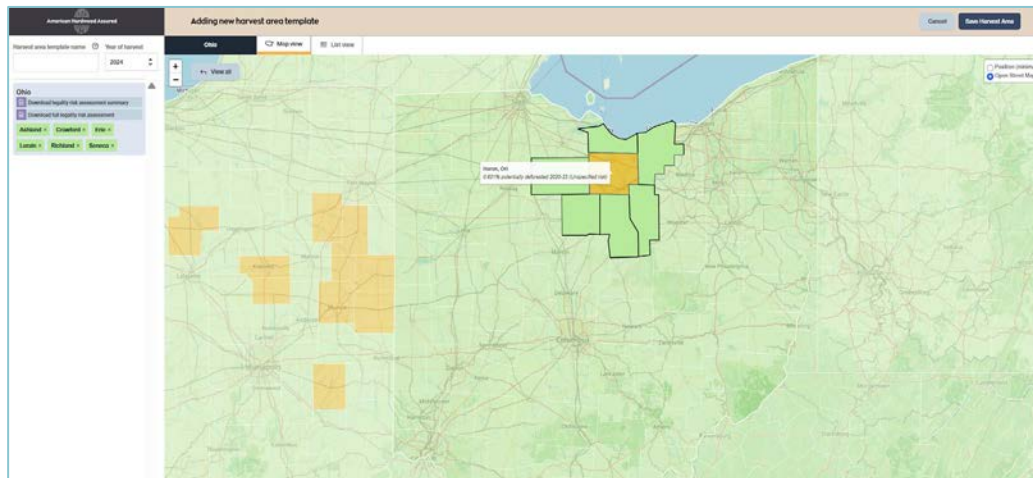
5. GEOLOCATION OUTPUT



Harvest polygons with precise geolocation are generated for due diligence and compliance.

AHA intuitive online platform

The screenshot displays the AHA online platform interface. The top section shows a dashboard with a sidebar menu on the left containing options like Dashboard, Shipments, Harvest Area Templates, Customers, Legality Risk Assessments, Company, and Logout. The main content area is divided into two panels. The left panel, titled 'Shipments', lists various shipment records with columns for ID, Container, Status, Date, and Location. The right panel, titled 'Harvest Area Templates', lists templates with columns for ID, Name, Status, and Date. Below these panels is a 'Customers' section with a list of customer names and their associated companies. The bottom section of the dashboard shows a 'Team' list with names and roles. The right side of the interface features a 'Shipment details' panel. This panel includes a 'Step 1 Details' section with a progress bar showing steps 1 through 4. Below this, the 'Products in shipment' section lists products with their HS codes, product types, and weights. The products are categorized by species (Quercus species, mainly Quercus alba) and harvested in 2025. The products are listed with their respective weights and a list of associated locations (e.g., Clark, Estil, Fayette, Garrard, Jackson, Jessamine, Lincoln, Madison, Mercer, Powell, Rockcastle, Woodford).



Delivers AHA
Statement for issue
with other shipping
documents



Thank You

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