THE LUMBER DAILY

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Finishes, Primers & Color Edition
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MARKET PULSE • WEDNESDAY, APRIL 8, 2026

■ TOP STORIES

R.P. Lumber Acquires Bender Lumber, Reaches 99 Stores Across Seven States

Family-owned R.P. Lumber Co. — the Edwardsville, Illinois–based full-service building materials retailer and home center chain — has acquired Indiana-based Bender Lumber, pushing its store count to 99 across seven states and putting it on the doorstep of the 100-store milestone. The deal continues a multi-year pro-dealer consolidation wave in which mid-sized independents are being rolled up by regional platforms. For specialty producers, the practical implication is fewer, larger decision-makers on the distribution side and increasing pressure to run prefinished and SKU-rationalized programs that fit a pro-dealer operating model.

Kronospan Extends European Panel Footprint with Sebes Sawmill Acquisition

Austrian wood-based panel giant Kronospan has expanded its Romanian operations with the acquisition of the Sebes sawmill, consolidating upstream solid-wood supply into one of Europe's largest OSB, particleboard, and MDF platforms. The move continues a pattern of vertical integration across the EU panel industry as raw-material volatility, EUDR compliance costs, and energy pricing push panel producers to lock in fibre. The deal tightens the Central European log market at a moment when Romania is already a key softwood and beech source for Italian and German millwork chains.

Alpenglow Timber $18.5M Loan Clears Path for New California Sawmill

Among the latest tranche of USDA Timber Production Expansion Guaranteed Loan awards, Alpenglow Timber LLC will receive $18.5 million to build a new California sawmill focused on processing material from federal forest restoration work — a rare greenfield mill announcement on the West Coast. Other notable recipients include Beachcombers LLC, receiving $12.3 million to acquire two former Teal-Jones Southern Yellow Pine mills in Antlers, Oklahoma and Liberty, Mississippi, and a $0.8 million award to reopen a sawmill in Shawano County, Wisconsin. The California award is the story PNW operators will watch closest: a new West Coast mill built specifically around federal fuels-reduction supply is a live test of whether the restoration-to-product pipeline can pencil.

■ DEEP DIVE: FINISHES, PRIMERS & COLOR

The Factory-Finish Shift: Labor Math Is Rewriting Millwork Specs

The most consequential finishing trend for specialty producers is not a color — it is the move of finishing off the jobsite and into the mill. Builder surveys now peg finishing-carpenter shortages at roughly 85% and painter shortages near 74%, and prefinished moulding, doors, and built-ins are winning share because they let installation happen later in the build, eliminate two trades from the critical path, and sharply reduce jobsite damage and callbacks. For anyone supplying specialty wood products, the value is migrating from rough and S4S toward primed, prefinished, and color-matched programs — and the producers with in-line coating lines are capturing margin that used to sit with the painter.

North America: Warm Woods Return, White Oak Still King, Walnut Back in Play

The 2026 palette across US and Canadian design trade publications has decisively swung warm. White Oak remains the dominant specialty specification, but the stain direction has flipped: out go the cool gray and greige washes that peaked around 2021, and in come warmer natural, honey, and golden treatments that let the wood read amber rather than ashy. Walnut is making a clear comeback for built-ins, millwork, and feature beams after years of cool-tone dominance, and warm-stained maple is showing up again. True gray is largely out. High-gloss is out across the board — matte and low-sheen finishes dominate, favoring penetrating hardwax oils and low-sheen waterborne topcoats over catalyzed lacquers for residential interiors.

Europe: Scandinavian Pale Oak Deepens, EU VOC Rules Push Waterborne Further

European specification continues to favor blonde, pale, and near-white oak — wide-plank, lye-and-soap or hardwax oil, low-sheen. The color direction is even lighter than North America, with whitewashed and ultra-pale muted blondes winning new construction. The other European story is regulatory: the Deco Paint Directive (2004/42/EC) and REACH have squeezed solvent-borne industrial wood coatings to the margins, and the EU Ecolabel revision for indoor paints and varnishes is tightening further. Waterborne coatings are now roughly 26% of global volume, up from 19% in 2021, with Europe the fastest adopter. Waterborne UV-cured systems — very low VOC, fast cure, hard film — are taking share in factory finishing lines supplying German, Italian, and Nordic millwork.

Asia-Pacific: Yakisugi Moves Indoors, Japan Exports a Dark-Wood Trend

The biggest crossover story from Asia is that Yakisugi (shou sugi ban) has moved decisively indoors in 2026. Once reserved for exterior cladding, charred Sugi and domestic cedar analogs are now being specified for feature walls, fireplace surrounds, kitchen islands, headboard walls, and entryways in North American and European high-end residential. Lighter char levels — grey-black and brown-black — are replacing the deep carbon finish of earlier cycles, creating a softer, warmer room without paint or wallpaper. The technique offers a natural, low-VOC alternative to solvent-borne dark stains and pairs well with the warm-wood direction elsewhere. For PNW mills, Western Red Cedar and even Douglas Fir are viable yakisugi substrates, opening a small but premium export-adjacent niche for producers willing to run char lines.

■ WHAT YOU MISSED YESTERDAY

Tuesday, April 7 — markets, energy, and the broader economy.

- **S&P 500** +0.08% to 6,616.85; **Nasdaq** +0.10% to 22,017.85; **Dow** –0.18% to 46,584.46. Five of the last six sessions green.
- **Catalyst:** Late-day rally on reports Pakistan brokered a proposal to extend the US–Iran Strait of Hormuz deadline by two weeks. Indices had been down as much as 1.2% intraday.
- **Oil:** WTI –0.8% to just above $111/bbl; Brent –~3% to roughly $106. Diesel held near $5.38/gal with fuel surcharges still in place on flatbed.
- **Bonds:** 10-year Treasury hovered near 4.30%; curve little changed.
- **Non-lumber:** Ceasefire optimism drove tape; airlines and shippers led gains, energy lagged.

■ INDUSTRY & COMPANY NEWS

- **Hardwood Federation to EPA:** Coalition letter to Administrator pushing to modernize woody biomass treatment under the Renewable Fuels Standard — current definition disqualifies virtually all woody-biomass fuel from eligibility.
- **Metrie Pre-Finished Program Expands:** Major moulding supplier continues to push factory-finished trim and door solutions as builders cite finishing carpenter (85%) and painter (74%) shortages.
- **Waterborne Coatings Share:** Global waterborne share at ~26% of wood-coating volume in 2026, up from 19% in 2021, driven by EU Deco Paint Directive, REACH, and California SCAQMD VOC tightening expected in 2026.
- **Lumber Futures:** May CME contract holding near $526.50/MBF — down roughly 24% from the August peak despite firming cash specialty markets.
- **USDA Wood Innovations:** $95M grant program deadline **April 22** — 14 days remain. Mass timber, CLT capacity, and market development projects eligible.
- **Ontario Professional Foresters:** Annual conference Apr 21–23 in Pembroke, ON — sustainable supply, Indigenous partnerships, climate adaptation.

■ FINISHING & COATINGS SNAPSHOT

INDICATOR	VALUE	TREND
Global Waterborne Coatings Share	~26% of volume	▲ from 19% (2021)
US Builders Reporting Finisher Shortage	~85%	▲ structural
US Builders Reporting Painter Shortage	~74%	▲ structural

Dominant Residential Finish Sheen, 2026	Matte / Satin	▲ (gloss out)
Top Specified NA Species (Interior)	White Oak	◆ holding #1
Returning Warm Species	Walnut / Warm Maple	▲ 2nd year
EU Ecolabel Paints Revision	In 3rd consultation	▲ tightening
CME Lumber (May)	~$526.50/MBF	▼ 24% from Aug peak

■ THE BOTTOM LINE

Three things for your Wednesday: **First,** finishing is no longer a downstream afterthought — labor shortages have pulled the paint booth back into the mill, and specialty producers who can deliver primed, prefinished, color-matched millwork are capturing margin that used to belong to the site painter. **Second,** the 2026 color conversation is fragmenting by geography in a way that matters for export programs: North America wants warm White Oak and Walnut in matte, Europe wants ultra-pale blonde oak under waterborne low-VOC topcoats, and Asia is exporting a dark-wood Yakisugi trend back into Western interiors — three distinct substrates, three distinct coating stacks. **Third,** regulation is quietly reshaping the coatings supply chain: EU Deco Paint Directive and Ecolabel revision on one side, California SCAQMD VOC rules on the other, are making waterborne and waterborne UV-cured systems the default for factory lines. Producers still running solvent-borne finishing are on borrowed time.