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TOP STORIES

European Hardwood Sawmills Press to Keep More of the Bloc's Logs at Home

In a September 22 statement, Germany's sawmill and wood industry federation (DeSH) reported a visit by Green member of the European Parliament Martin Hausling to the Abalon Hardwood sawmill in Schwalmstadt, Hesse, joined by the European Organisation of the Sawmill Industry (EOS) and DeSH. The statement said rising demand from outside the European Union for EU logs means value added, rural jobs and investment are lost when the logs leave unprocessed. The groups asked for policy frameworks that strengthen processing inside Europe, no additional regulatory burden and support for investment. The statement named no specific policy tool and proposed no export restriction. EU trade statistics put hardwood log exports from the EU to the rest of the world at EUR 647.6 million in 2025, on 2.53 million metric tons, up from EUR 605.7 million in 2024. China took EUR 383.5 million, or 59.2 percent, down from a 62.9 percent share. Vietnam took EUR 159.6 million, or 24.6 percent. Oak made up EUR 335.0 million of the total, up from EUR 284.5 million, and EUR 250.5 million of that oak went to China. Beech exports fell to EUR 114.6 million from EUR 138.4 million.

Owens Corning's Walkerton Door Plant Enters Scheduled Layoff Window

Owens Corning scheduled separations at its interior door plant in Walkerton, Indiana, a former Masonite site, to begin on or about September 19. The company announced the permanent closure in the second quarter. It affects about 130 employees, with the main separation window running through October 2 and the remaining wind-down employees scheduled to leave by October 29. Walkerton is the sixth Doors-segment facility closure listed in the company's filings since it acquired Masonite. The others are Santiago, Chile; Prineville, Oregon, announced in the second quarter of 2025 with estimated charges of about US$12 million in cash and $30 million non-cash; Greenville, Texas; Aldergrove, BC, announced in the fourth quarter of 2025 at about $22 million cash and $7 million non-cash; and Mesquite, Texas. Walkerton carries estimated charges of about $6 million cash and $7 million non-cash. Cumulative charges under the program reached $146 million as of June 30, with more expected through 2026. The Doors segment posted second-quarter net sales of $513 million, down 7 percent from $554 million, and segment EBITDA of $57 million against $75 million. The company reports $135 million of run-rate cost savings from the Masonite deal, above a $125 million target, and says it is on track for another $75 million from network optimization.

Domtar Settlement Proposed Over Plymouth Mill Contamination

North Carolina's Department of Environmental Quality, the National Oceanic and Atmospheric Administration and the Fish and Wildlife Service filed a proposed consent decree in federal court on September 16 with Domtar Paper Company over natural resource damage from the Plymouth, North Carolina mill. The claim, brought under the federal Superfund law, covers releases of dioxins, furans, mercury and volatile organic compounds into groundwater, soils, Welch Creek and the lower Roanoke River. A fish consumption advisory has been in effect since 1990. The mill began operating in 1937, was run by Weyerhaeuser from 1957 and has been owned by Domtar since 2007. The draft restoration plan filed alongside the decree includes a conservation deed restriction on about 760 acres of Warren Neck forested wetlands and about $1.75 million for floodplain reconnection, wetland protection and fish passage. It also gives credit for work already done at the mill, including cooling towers that ended the mill's river water withdrawals, which had pulled in larval fish. Public comment on the plan runs to October 16.

WHAT YOU MISSED YESTERDAY

Wednesday, September 23 — business, markets, and the broader economy, with Thursday morning's new home sales report.

- US equities fell. The S&P 500 lost 58.61 points, or 0.75 percent, to 7,706.03. The Dow fell 352.10, or 0.68 percent, to 51,511.59. The Nasdaq Composite dropped 308.24, or 1.13 percent, to 26,936.04.
- A flash survey of purchasing managers came in above expectations. The composite index rose to 58.4 from 56.0, the manufacturing index to 57.0 from 53.9, and the services index to 58.7 from 56.5.
- Treasury par yields jumped. The two-year rose 14 basis points to 4.85 percent, the 10-year 15 basis points to 5.11 percent and the 30-year 11 basis points to 5.40 percent.
- On diesel exports, Energy Secretary Chris Wright said Wednesday the administration is working with refiners to curb fuel exports voluntarily. A White House official disputed a report that a ban was being drafted.
- New home sales released Thursday ran at an estimated seasonally adjusted annual rate of 684,000 in August, up 6.4 percent from July and down 2.0 percent from a year earlier. The median sales price was $393,700, down 5.8 percent from a year earlier, and supply fell to 8.5 months from 9.0. The Canadian dollar daily average was 1.4096 to the US dollar, from 1.4064.

INDUSTRY & COMPANY NEWS

- **BlueLinx** made Westlake Royal Building Products its sole and exclusive PVC trim supplier in key markets. Kleer PVC trim is launching at 27 BlueLinx locations across New England, the North and Mid-Atlantic, the South, the Ohio Valley and select Central markets. TruExterior siding and trim expands to 17 locations from 12, adding five in Massachusetts, Vermont, Maine and New York. The westernmost stocking locations named are Minneapolis, Des Moines and St. Louis, and no financial terms were disclosed. It is the distributor's third specialty product distribution announcement this month, after Trex on September 3 and RDI railing on September 15.
- **Ethan Allen Interiors** filed its definitive proxy statement Thursday for a contested annual meeting on November 4, with a September 11 record date. The board is backing its five nominees against a slate from DGB Investment, the vehicle of investor Doug Bergeron, which the company says holds 5.2 percent and is seeking to replace the entire board and the chief executive officer. DGB is soliciting votes on its own proxy card. The company set out its succession timeline on September 21.
- **Blum Inc.**, the cabinet hardware maker, plans an $82 million expansion at its campus in Stanley, North Carolina, including a new office and showroom, with 20 additional jobs, according to local reports this week.
- **Vermont utility regulators** have temporarily waived some wood-sourcing requirements at the state's two wood-burning power plants, McNeil Generating Station in Burlington and Ryegate Power Station, so they can buy pulpwood that had been headed to the Finch Paper mill in Glens Falls, New York, which said in July it would stop buying local pulpwood. The waiver, announced earlier this month and reported this week, lets the plants take wood from harvests that fish and wildlife officials have not inspected for wetland and endangered-species habitat impacts. It runs through the end of the year and covers only wood intended for Finch from harvests completed or under way by the end of July, and the chips must still meet some sustainability guidelines. Finch had bought about 2,000 tons of Vermont pulpwood a week and was a key market for hemlock chips. The two power plants buy about 600,000 tons of wood chips a year.
- **Wildfire status.** Thursday morning's national situation report held both the national and Northwest preparedness levels at 2. Personnel committed nationally fell by 1,179 to 7,344, and the Northwest's by 966 to 3,324, or 45.3 percent of the total. The Northwest still carries 13 of the 29 uncontained large fires nationally and reported no new fires Wednesday. By structures lost, its leading incidents are unchanged: Little Giant in Washington at 40, Grasshopper and the Rowe Creek Complex in Oregon at 33 each, and Sinlahekin near Tonasket, Washington, at 31. Sisi, near Stehekin, and Three Queens, near Snoqualmie Pass, both list residences threatened. In California, the Timber Fire near Big Sur is 59 percent contained with numerous structures threatened.

■ DEEP DIVE: THE HARDWOOD FLOOR

Less Floor, Fewer Dollars

A widely used annual trade estimate, measured at the first point of distribution, puts 2025 US wood flooring sales at US$1.774 billion, down 3.8 percent, on 630 million square feet, down 6.8 percent. In 2024 sales fell 9 percent to $1.845 billion and volume fell 10.7 percent to 676 million square feet. The same estimate put 2015 at $2.059 billion and 815 million square feet, so volume is down 22.7 percent over the decade and value 13.8 percent. Wood's share of all US flooring fell to 7.5 percent of value and 3.7 percent of volume in 2025, from 9.6 percent and 4.7 percent five years earlier. Engineered product is about 77 percent of wood flooring and prefinished about 82 percent. Residential replacement accounts for 69.4 percent of demand, new construction about 17 percent and commercial about 10.6 percent. Specialty flooring stores account for about 42 percent of wood flooring sales, and home centers about 28 percent, down from 32 percent.

The Price Index Kept Climbing

The producer price index for hardwood flooring, series WPU081204, stood at 277.894 in August on a preliminary basis. That is up 0.3 percent from July and 3.1 percent from 269.477 a year earlier, and the highest reading since at least 2007. The index first passed its July 2022 peak of 265.843 in March 2025. The index is 43.8 percent above its January 2021 level of 193.3. Within it, oak and maple flooring rose 3.2 percent over the year to 281.828, and flooring of other species rose 2.4 percent to 152.034. The broader hardwood lumber index, WPU0812, rose 1.7 percent over the same year. Dividing the trade estimate's dollars by its square feet gives about $2.82 a square foot in 2025, against $2.73 in 2024 and $2.53 in 2015.

Canada Leads One Flooring-Panel Import Line

US imports of multilayer flooring panels other than bamboo, tariff line 4418.75, were worth US$271.0 million in 2025, down 14.2 percent from $315.8 million in 2022, measured at import value including freight and insurance. Canada supplied $80.0 million, or 29.5 percent. Vietnam followed at $45.1 million, then Indonesia at $25.9 million, Thailand at $22.3 million and Poland at $19.8 million. China shipped $3.0 million; antidumping and countervailing duty orders on its multilayered wood flooring date to December 2011. The line covers only part of the engineered trade, because engineered flooring can also enter under plywood headings. Other assembled flooring panels fell to $38.3 million from $48.1 million in 2022, and bamboo panels to $13.5 million from $16.0 million.

Plants Coming Off Line

Mullican Flooring's Ronceverte, West Virginia plant, reported here Wednesday, is set to close around Thanksgiving with about 70 jobs affected, and plant officials cited weak demand for high-end hardwood flooring. It follows two closures at AHF Products. The company announced on August 20, 2025 that it would wind down production at Somerset, Kentucky, an engineered flooring plant opened in 1990, by December 12, 2025, with densified products running through February 2026. AHF closed its solid hardwood flooring plant at Warren, Arkansas, on September 27, 2024, affecting about 130 jobs. In its Somerset closure announcement, AHF described its US footprint as two solid wood flooring plants, two sawmills and one engineered wood plant, alongside resilient and porcelain plants and an engineered flooring plant in Cambodia.

■ MARKETS & FUEL SNAPSHOT

INDICATOR	VALUE	TREND
10-year Treasury par yield	**5.11%**	Up 15 basis points; 2-year 4.85%, up 14
US retail diesel, Sept 21 survey	**$6.529/gal**	Up 24.4 cents on the week, $2.78 on the year
West Coast retail diesel	**$7.456/gal**	California $8.246; West Coast ex-California $6.791
New home sales, August	**684,000**	Annual rate, up 6.4% from July, down 2.0% on the year
New home median price, August	**$393,700**	Down 5.8% on the year; 8.5 months' supply
Canadian dollars per US dollar	**1.4096**	Daily average, from 1.4064 Tuesday and 1.3988 Sept 17

■ THE BOTTOM LINE

Europe's hardwood sawmills want more of the bloc's logs sawn at home, while China and Vietnam take most of what leaves. A former Masonite door plant in Indiana has entered its scheduled layoff window, the latest in a series of announced closures that includes Prineville and Aldergrove. State and federal trustees proposed a settlement over decades of contamination from a North Carolina paper mill. Stocks fell and yields jumped Wednesday after strong business surveys, and retail diesel kept climbing. Wood flooring keeps losing volume and share even as its producer price index keeps rising.

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