STA | STRUCTURAL TIMBER ASSOCIATION

MARKET ANALYSIS

NOVEMBER 2026



Myth Busting – Trees are a crop





Myth Busting



Harvester can cut a tree every minute
Cost around 5million SEK (£500k)
Machine 6,000 hours, 3 years, old, and will last around 10,000 hours.
Crop age around 65 years
Final felling going into saw logs, with top going into pulp
Smaller trees 5 years
Dead wood stumps left, as well as protected eco diversity area



5% of forest set aside for nature
Mixed planting for bio-diversity
From 2500 saplings 800 will go to term (65yrs)
Bio-fuel waster returned to forest

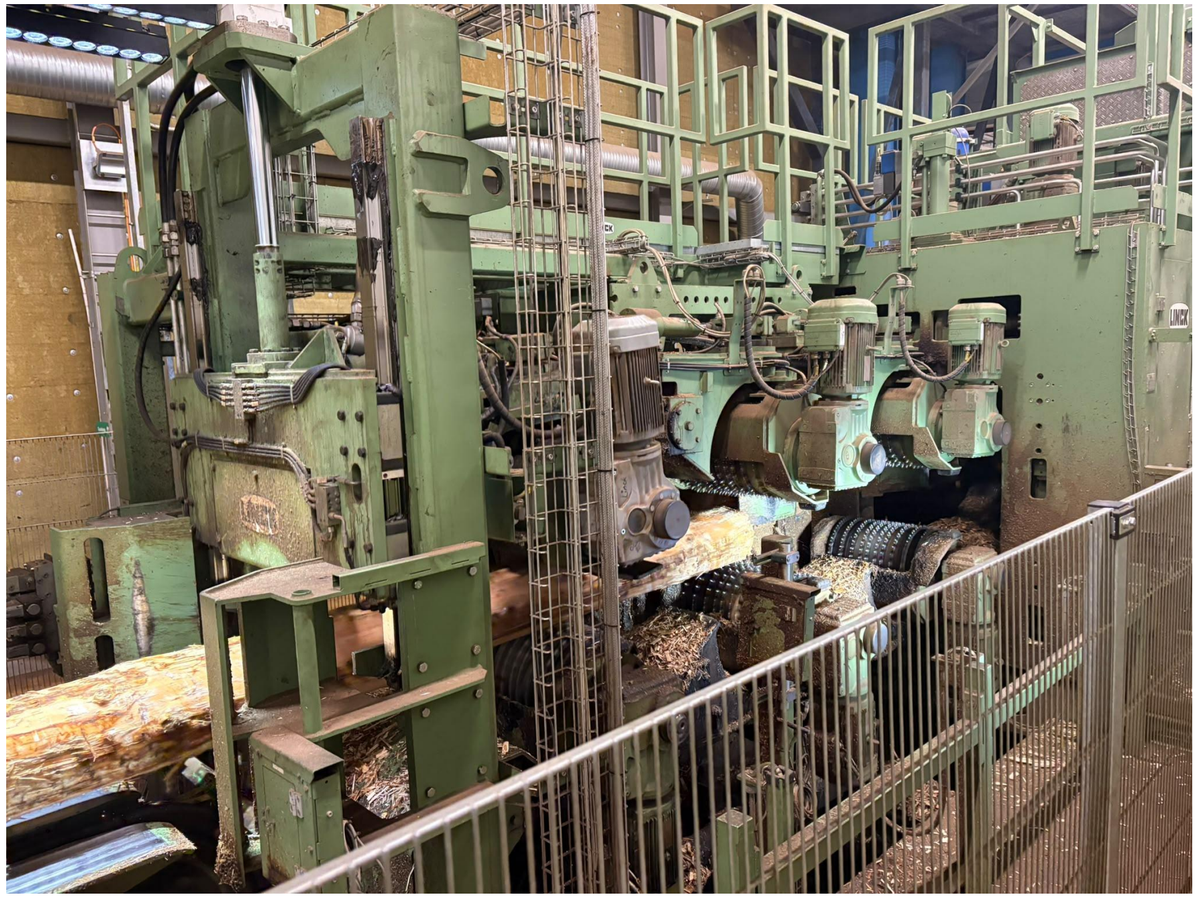
75% of Sweden is forests – Sweden is twice the area of the UK

Myth Busting





- 1.9 million tonnes pulp
- 1.8 million m3 sawn timber.
- Biochemicals (turpentine, taloils), Biofuels, Biomaterials, Building systems, Dissolving pulp, Electricity, Heating, Paper pulp, Seedling, Wood products
- 29% of product goes to UK (largest market) followed by Sweden (24%), Holland (12%), USA (6%), Germany (5%),




LINCK

Saw Mills are high Tech



Log optimisation

UK Housing Market 2025 “The devil is in the detail”

Current Housing Market conditions - It’s a bit rubbish

Government announcements -

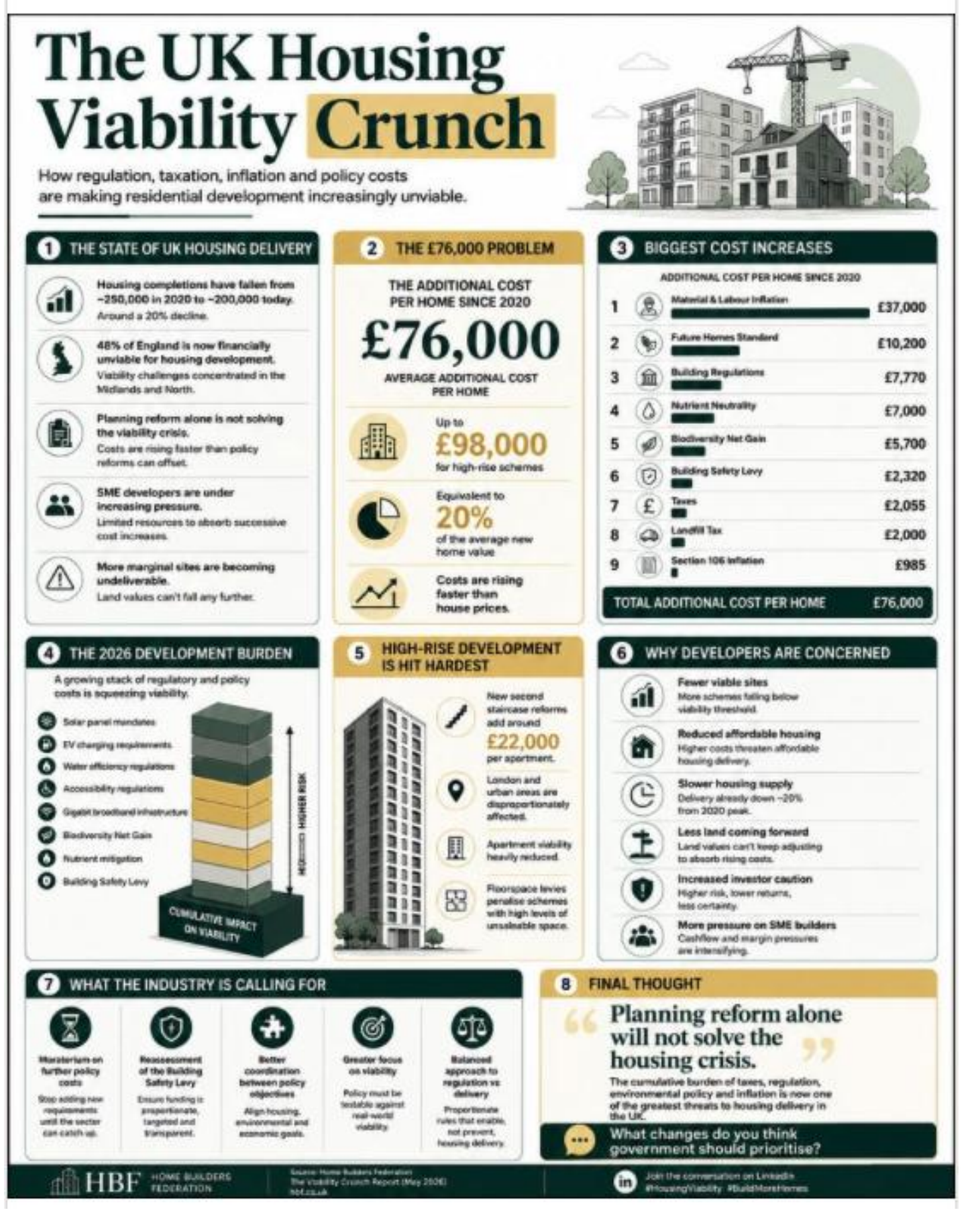
1. £39bn for Social and Affordable Housing Programme – over 10 years
2. Burnham pledge to build more council houses
3. Help to buy announcement
4. GLA Master plan consultation – regulation interference
5. Planning Reform
6. Homes England
7. New Towns – 12 down to 7 going forward – 2 by end of this Parliament
8. Contradictory regulation changes – Part B/TiC/FHS
9. Skills shortages – funding woeful
10. Consumer confidence – Income falling in real terms and un-employment forecast to rise in next 12 months
11. Affordable housing focussed on addressing existing stock
12. Site viability



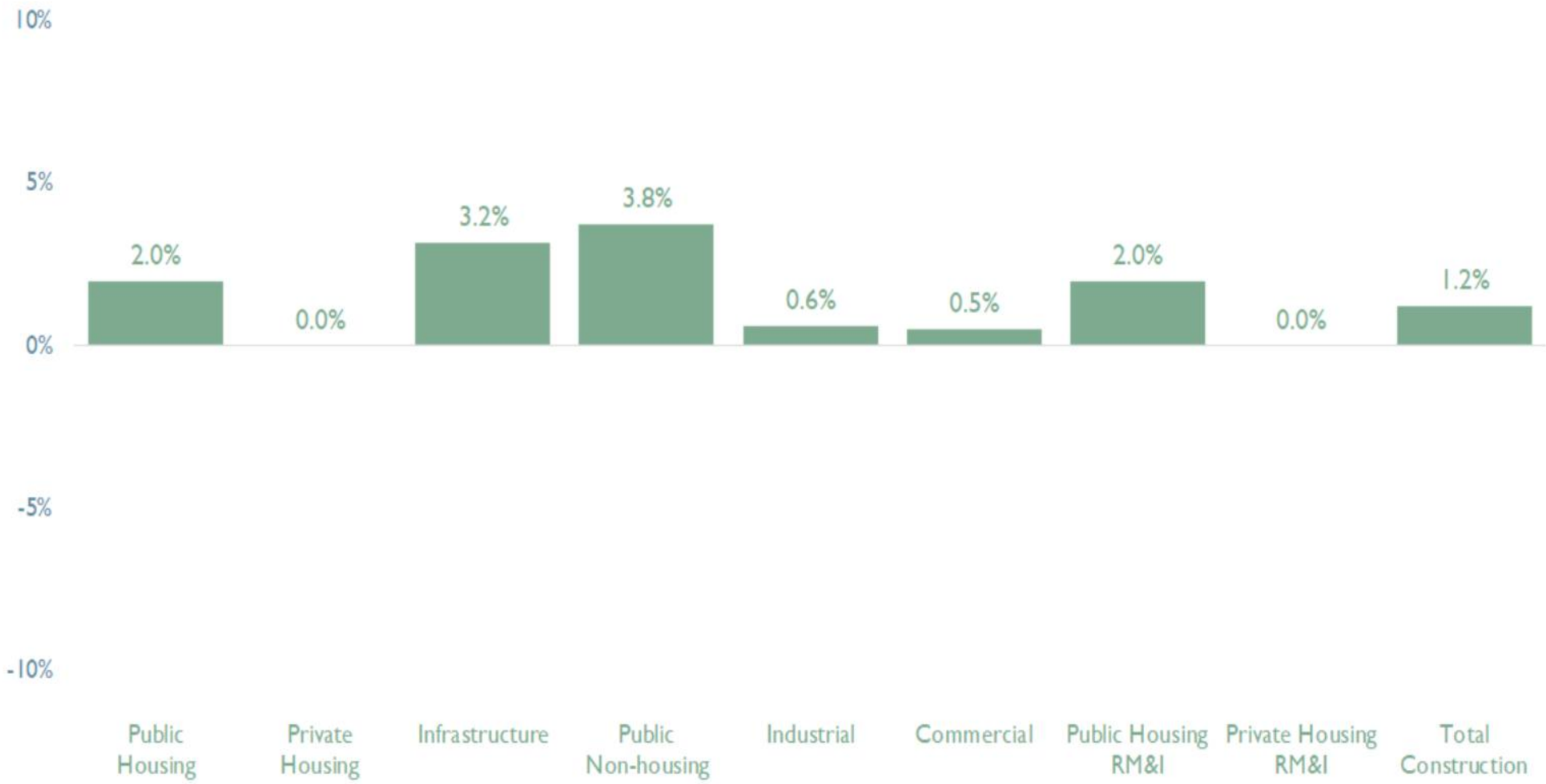
Viability – HBF View

Additional costs for each new home

Building Safety **£2,320**	**Future Homes Standard** **£10,200**	**Landfill Tax** **£2,000**
Biodiversity Net Gain **£5,700**	**Building regulations** **£7,770**	**Taxes** **£2,055**
Material and labour **£37,000**	**Section 106 inflation** **£985**	**Nutrient neutrality** **£7,000**
Total additional costs from new taxes, levies and inflation **£76,000**	**Potential additional costs for high rise buildings** **£22,272**	**Potential total average for homes within high-rise buildings** **£98,000**



Forecast 2027 – Summer 26



Source: CPA

Structural Timber Adoption Factors

Some glimmer of optimism for the structural timber industry? –

- Apartment to houses ratio continues to diverge in favour of houses [BSA effect?] = market increase
- Timber in Construction Roadmap - stimulating interest
- 7 out of 15 national housebuilders self supply by 2026 – stimulating interest
- Skills shortages provides opportunity to Structural Timber construction
- Scottish Building Standards support ongoing use of timber frame
- FHS compliance made easy
- STA Assure - the journey continues

- **Share has increased in England in 2024 from 12% to circa 15% in 2026 - a 25% increase in 2 years**



STA ASSUREGOLD

Timber in Construction Roadmap

Current State

TIC Roadmap (Dec 23)

Work Groups	Gov'ment	Gov/Ind	Industry
Carbon	5	0	3
Skills	0	4	4
Timber Supply	6	6	5
Innovation	2	1	3
Demand	7	0	2
Insurance (Mass Timber)	0	0	2
Safety (Mass Timber)	0	1	2
	20	12	21

7 x Work Groups

53 Commitments

Critical Future Activities (Not Funded or Resourced)

Critical Activity	Rationale & Impact	Industry Response
Building Regulations	Engagement with BSR	AD-B Follow Up Plan & Alternative Route to Compliance for Timber (STA)
Fire Compliance	Fire during construction remains important, housing mitigation could be less costly	Testing & update to STA PP5 Guidance (STA)
	Fire in use is fundamental, demonstrating junction fire detailing compliance is critical	Testing & Guidance of TF Fire Detailing (STA)
Mass Timber	Fragmented activity, no central forum, stakeholder challenges, unintended consequences, needs help !	Mass Timber Review & Creation of Funded/Resourced Forum (STA)
Communications	Thirst for information, latest news, case studies, progress updates..... but nowhere to go !	TIC Industry Webpage (CTI)
Coordination	A clear and simple delivery plan is needed, with critical activities fully funded, resourced and coordinated	Industry Delivery Plan (CTI)

Homebuilders TF Hub….. Key Themes

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Fire Safety
(Testing, pattern book & mitigation, junctions, penetrations & compliance evidence)

How to Transition
(From masonry to TF, change management, upskilling, hand holding & education)

Construction Process
(What's different from masonry, trades, key stages & things to watch)

Thermal Performance
(Psi values, timber fractions overheating & thermal mass)

House Designs
(TF friendly, DFMA & buildability)

Embodied Carbon
(Datasets, emissions declarations & EPDs)

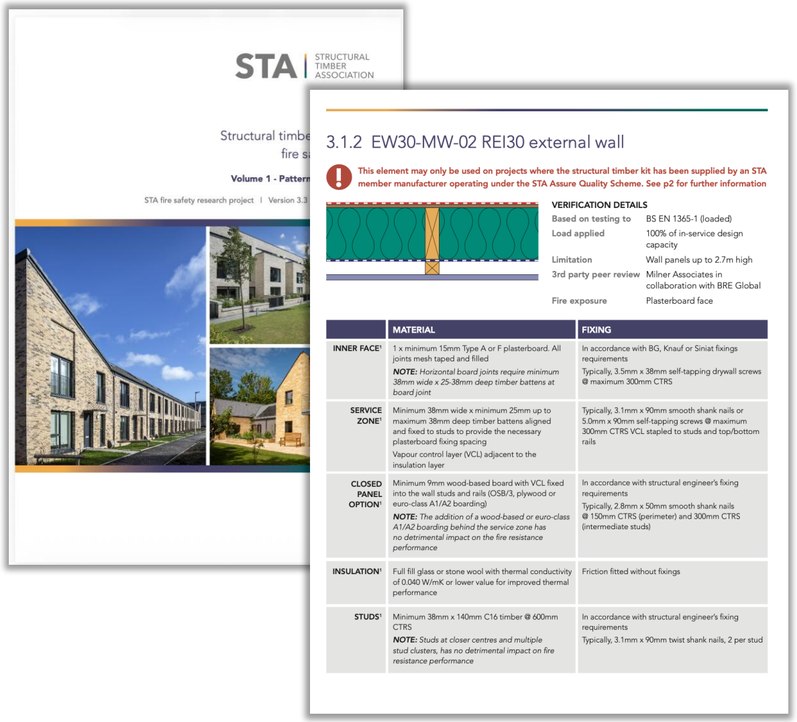
Next Steps**: Prioritise** issues and possible outcomes, via online survey & develop **action plan for top 3 issues** to be addressed

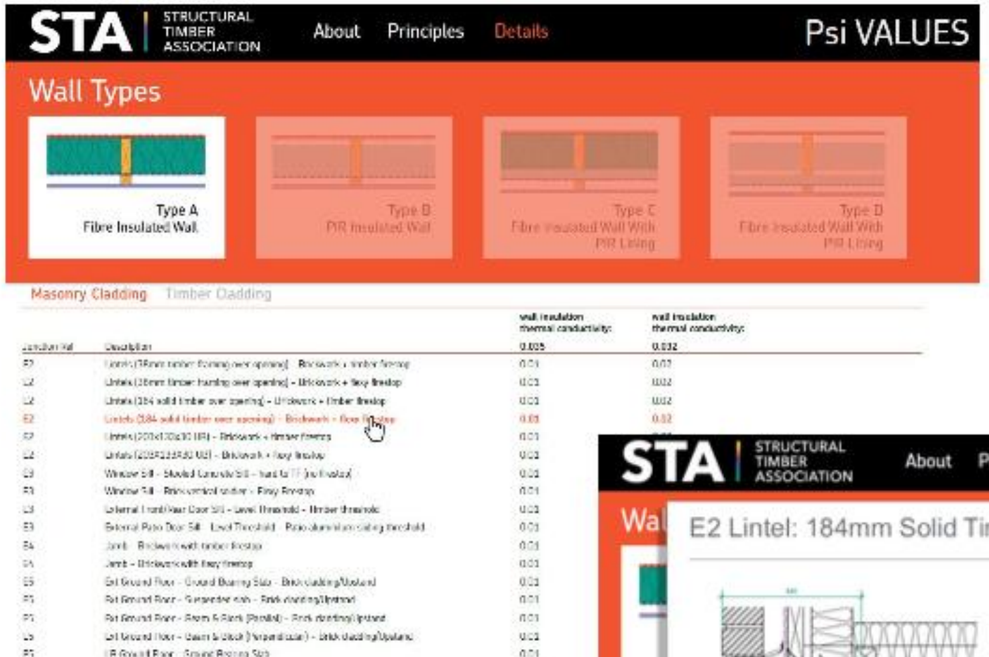
Thermal Details Platform

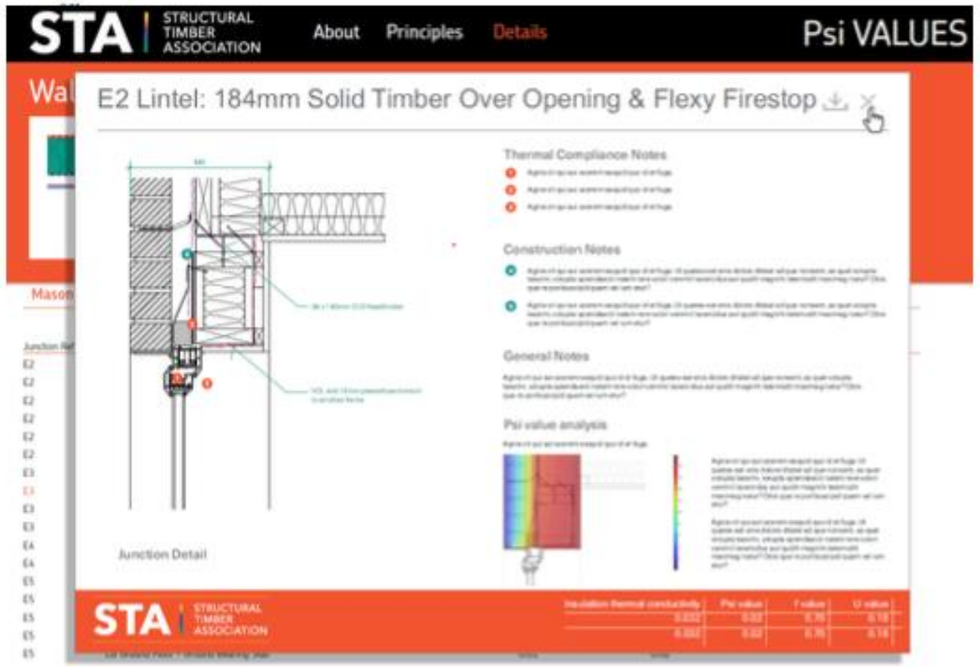
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Background

- Online thermal details platform
- Easy search, select & download info
- Industry recognised database







TF Learning Journeys

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STA | STRUCTURAL TIMBER ASSOCIATION in partnership with Future Homes Hub

in Association with PEFC SWEDISH WOOD West Fraser HUNDEGGER







SUSTAINABLE HOUSING IN ENGLAND - LESSONS FROM SCOTLAND

TIME TO EXPLORE HOW YOU BUILD.

DAY 1: 21 OCTOBER

A HOTEL DEPARTURE 08:15

Courtyard Marriot Hotel
Rressen Circle
Dalcross
Inverness
IV2 7BL

15 min travel time to first destination



B OSB - WEST FRASER 08:30 - 10:00

Morayhill
Dalcross
Inverness
IV2 7JQ

30 min travel time to next destination



C SAWMILL - JW GORDON 10:30 - 12:00

Balblair Road,
Nairn
IV12 5LY

30 min early lunch at the sawmill at 11:30
30 min travel time to next destination



D FORESTRY & LAND SCOTLAND 12:30 - 14:00

Culbin Forest,
Cloddymoss,
Forres,
IV36 2TG

15 min travel time to next destination



E I-JOIST - JAMES JONES 14:15 - 15:45

Greshop Industrial Estate
Forres
IV36 2GW

**Travel time to hotel is about two hours - Wi-Fi will be available on the coach



F TOR-NA-COILLE HOTEL 17:45

Inchmarlo Rd,
Banchory
AB31 4AB,

19:30 Meet for Dinner



DAY 2: 22 OCTOBER

A HOTEL DEPARTURE 08:15

Inchmarlo Rd,
Banchory
AB31 4AB,

15 min travel time to first destination



B CALA HOMES - SITE 1 08:30 - 09:00

Raemoir Park
Raemoir Road
Banchory
AB31 4EQ

30 min travel time to next destination



C KIRKWOOD HOMES - SITE 2 09:30 - 10:30

Sauchen
Aberdeenshore
AB51 7JH

15 min travel time to next destination



D KIRKWOOD TIMBER FRAME 10:45 - 12:15

Sauchen
Aberdeenshore
AB51 7JH

30 min light lunch at Kirkwood
45 min travel time to next destination



E BANCON CONSTRUCTION - SITE 3 13:00 - 14:30

Cloverhill
Bridge of Don
Aberdeen
AB23 8BD

30 min travel time to next destination



F ABERDEEN AIRPORT 15:00 DROP OFF

Dyce
Aberdeen




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