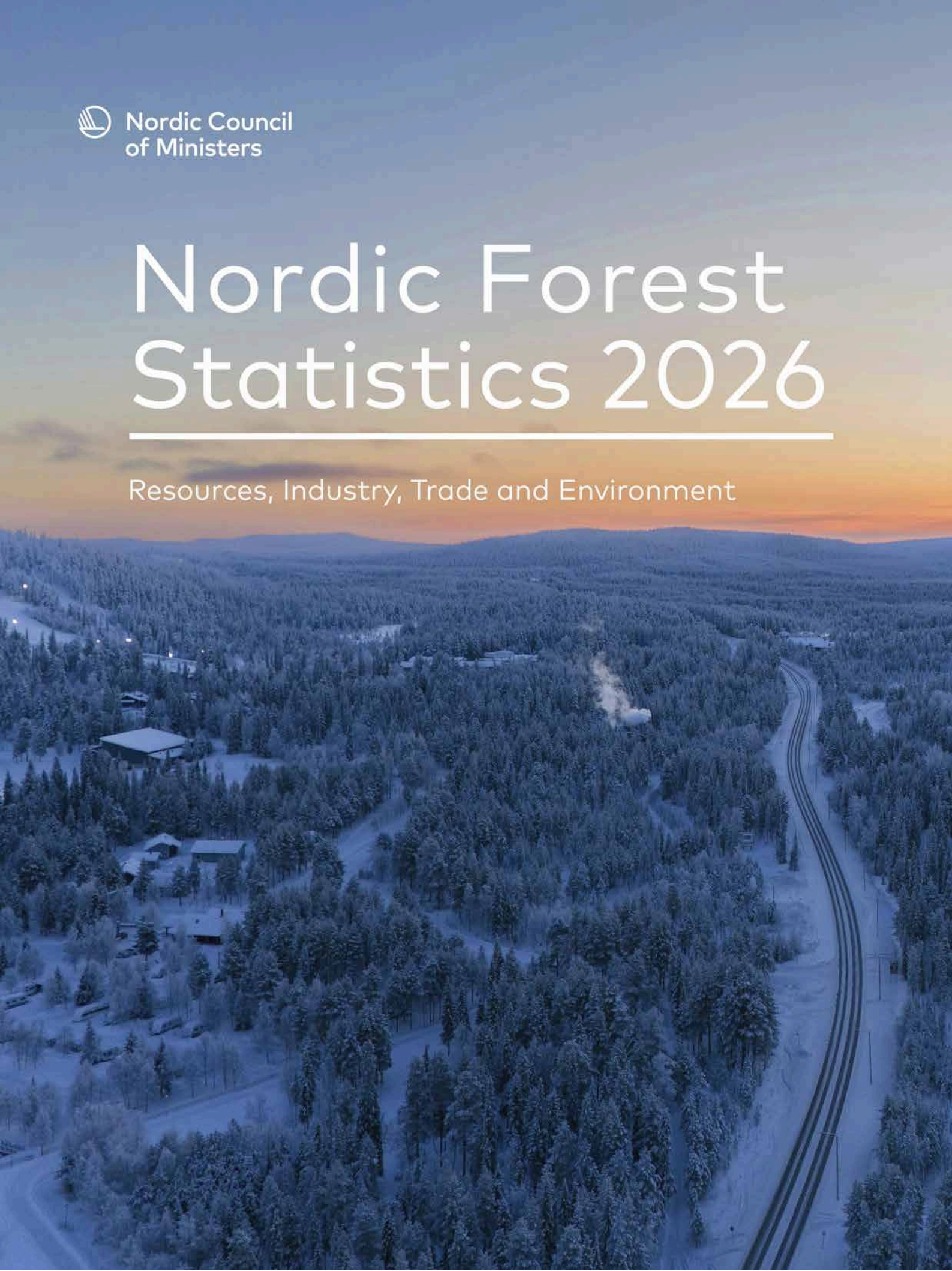
Nordic Council of Ministers

Nordic Forest Statistics 2026

Resources, Industry, Trade and Environment



Nordic Forest Research (SNS)

This report has been commissioned by Nordic Forest Research (SNS). The organization act as cooperation body for the Nordic Council of Ministers, under the Nordic Council of Ministers for Fisheries and Aquaculture, Agriculture, Food and Forestry (MR-FJLS).

SNS's mission is to promote, coordinate and strengthen joint Nordic research efforts in forestry, to increase synergies at the Nordic level and to link research to policy by providing well-founded, evidence-based, and policy-relevant information to the Nordic Council of Ministers and other decision-makers.

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Preface

Nordic Forest Statistics 2026 is a compilation of key statistics on forest resources and the forest industry in the Nordic region: Denmark, Finland, Iceland, Norway, and Sweden. The report is an updated and expanded follow-up to the editions published in 2020 and 2023.

The original initiative was based on the need to navigate the large volume of available international statistics. The reports have been supported by Nordic Forest Research (SNS); a cooperative body financed through Nordic funds under the auspices of the Nordic Council of Ministers. The authors are responsible for the selection of statistics and the accompanying text.

The data have been compiled from a wide range of sources, mainly national statistical agencies, but also harmonised statistics produced by FAO, Forest Europe, Eurostat, UNECE and UNFCCC. For several datasets, such as trade, production, and prices, we have been able to use the most recently published statistics, while information on forest resources often has a time lag of several years.

We are grateful for the advice and contributions provided by various experts.

Bankeryd, Seattle and Stockholm May 2026

Mats Hannerz, Silvinformation AB

Håkan Ekström, Global Wood Trends

Johan Freij, Independent Senior Advisor – Forest, Industry & Economy

Summary

The combined forest area of the five countries accounts for 1.5% of the global forest area. Nevertheless, Nordic exports of paper and paperboard account for 14% of global exports, while sawn wood exports account for 24%.

Nordic forests also make a significant contribution to combating climate change, both by supplying renewable materials that replace fossil-based products and by acting as a carbon sink through growing biomass.

In addition, forests provide habitat for thousands of species, some unique to the region, and offer highly valued recreational opportunities for people across Europe. Forests in the northern part of the region also form one of the few remaining large wilderness areas in Europe.

Highlights

- The Nordic countries account for 1.5% of the global forest area and 1.2% of global growing stock. However, their share of global production of sawn wood and pulp is 10–11%, while their share of global exports is 11% for pulp, 14% for paper and 24% for sawn wood.
- The Nordic region is the world's largest exporter of sawn wood. The export reached a record 24 million m^3 in 2025, with Swedish and Finnish sawmills shipping 14 million m^3 and 9 million m^3, respectively. This expansion coincided with declines in exports from other major producing countries, including Canada, Russia, and Germany. As a result, the Nordic share of European exports rose sharply to 63% in 2025 (up from 43% in 2021), while their share of global exports increased to 24% (from 17%).
- Paper production in the Nordic countries declined from 25 million tonnes in 2010 to 15 million tonnes in 2024, but the Nordic region is still the world's largest exporter of paper.

- In Finland, each person has access to 4 hectares of forest, while in Sweden the figure is 2.6 hectares. By contrast, each person in Great Britain has 0.05 ha and in Belgium 0.06 ha.
- A total of 9.9 million hectares of forest in the EU are strictly protected (meaning no or minimal intervention). Half of this area is in Sweden and Finland.
- Among European countries, the Nordic region accounts for 34% of forest area, 24% of growing stock and 33% of current annual fellings.
- Over the past 100 years, growing stock has tripled in Norway and doubled in Sweden and Finland. Although increment has fallen due to drought in the late 2010s, the growing stock has increased by 260 million cubic metres over the past 10 years across the Nordic countries.
- In the Nordic countries, 27% of the total energy supply comes from bioenergy, and 57% from renewable sources. In the EU, the corresponding shares are 14% and 24%. In the Nordic region, a vast majority of bioenergy is wood based.
- In 2024, total net removals of carbon in the land use, land-use change, and forestry sector (LULUCF) exceeded emissions by almost 7 million tonnes in Sweden. Greenhouse gas emissions in the Nordic countries declined by 35% (including LULUCF) between 1990 and 2024. Carbon sequestration in growing forests, together with the substitution of fossil fuels by bioenergy from forest residues, have been major contributing factors.
- Carbon stocks in Nordic forests increased by 29% between 1990 and 2020.

Key tables

Table 1: Key figures for forest resources
Source: FRA 2025. Growing stock from Luke, Statistisk Sentralbyrå[1] and SLU.

	Land area, 1000 ha	Forest area, 1000 ha	Forest cover %	Forest cover per capita, ha	Growing stock, million m^3
Sweden	40,727	27,934	68.6%	2.6	3,552
Finland	30,396	22,543	74.2%	4.0	2,578
Norway	36,427	12,108	33.2%	2.1	1,194
Denmark	4,243	646	16,1%	0,1	145
Iceland	10,083	61	0.6%	0.2	1.5
Nordic total	121,876	63,290	52,0%	2.2	7,414
Europe total	496,198	187,231	37,7%	0.3	31,686
Nordic share of Europe	25%	34%			24%
EU total*	399,83	161,86	40.5%	2.8%	27,936
Nordic share of EU*	18.8%	31.6%			32%
World total**	13,020,000	4,140,220	31.8%	0.5	629,940
Nordic share of world total	0.9%	1.5%			1.2%

* Excl. Norway and Iceland

** World total land area is exclusive Antarctica.

1. Values under bark multiplied with 1.18.

Table 2: Key figures of forest protection
Source: SoEF 2025, FSC and PEFC.

	Protected forest, all categories, 1000 ha	Strict protected forests, 1000 ha	Certified forest PEFC[2], 1000 ha	Certified forest FSC[3], 1000 ha
Sweden	2,591	2,171	16,434	19,957
Finland	3,306	2,669	16,921	2,604
Norway	947	705	7,256	720
Denmark	194	69	360	233
Iceland	1.6	0	0	0
Nordic total	7,057	5,614	40,972	23,513
Europe total	47,313	11,259	80,368	49,395
Nordic share of Europe	15%	50%	51%	48%
EU total*	43.770	9,890	71,307	43,536
Nordic share of EU*	14%	50%	47%	52%

* Excl. Norway and Iceland
Note: Protected forest = MCPFE categories 1-2 (Biodiversity or Landscape protection), Strict protected forest = MCPFE categories 1.1-1.2 (no or minimum intervention).

2. Data for 2026.
3. Data for 2026.

Table 3: Key figures for the production of forest products
Source: FAO 2025. Data for 2024.

	Sawn wood, softwood, million m^3	Pulp, million tonnes	Paper, million tonnes
Sweden	17.8	10.9	8.1
Finland	10.9	9.3	6.9
Norway	2.7	0.9	1.0
Denmark	0.25	0.0	0.0
Iceland	0.0	0.0	0.0
Nordic total	31.6	21.1	16.0
Europe total	108.7	34.5	83.3
Nordic share of Europe	29%	61%	19%
World total	320	190	423
Nordic share of word total	9.9%	11.1%	3.8%

Table 4: Key figures for exports of forest products
Source: FAO 2025, data for 2024.

	Sawn wood, softwood, million m^3	Pulp, million tonnes	Paper, million tonnes
Sweden	13.7	3.3	8.3
Finland	9.0	4.0	6.3
Norway	0.9	0.2	0.8
Denmark	0.3	0.0	0.2
Iceland	0.0	0.0	0.0
Nordic total	23.9	7.5	15.6
Europe total	38.0	14.8	55.8
Nordic share of Europe	63%	50%	28%
World total	101	66	112
Nordic share of the world total	24%	11%	14%

Introduction

The Nordic region has, by far, the highest share of forest cover in Europe. But this lone statistical fact can only give a hint of the importance that forests and forestry have in most of the region. Forests and forestry have a deep cultural and social significance, while the forest industry is one of the pillars of the economy. The Nordic forests are also home to some of Europe's largest remaining wilderness areas, underscoring their significance in an even wider context.

The present report aims to provide an overview of all key aspects of Nordic forests. It does so in seven thematic chapters, which compile data from many different sources.

However, since these chapters relies on the data collected by the national forest inventories, we would first like to describe and pay tribute to the history and tradition of forest statistics in the Nordic countries.

The birth of national forest inventories

The Nordic countries are widely regarded as having some of the most advanced and accurate forest inventories in the world. No other region has such detailed, century-long information on its forest resources, as Sweden, Finland, and Norway. Norway was the first country in the world to establish a National Forest Inventory (NFI) in 1919 – *Landsskogtakseringen*. A few years later, similar NFIs were introduced in Finland (1921) and Sweden (1923).

Over time, more countries adopted a systematic inventory approach, which is now standard practice in many parts of the developed world. Denmark collected forest data through questionnaires from 1881 to 2000, but since 2006 has operated a National Forest Inventory based on field measurements in sample plots. Iceland introduced its National Forest Inventory in 2005.

Figure 1: One of the first national inventory teams in Sweden, 1924. Photo: Unknown. Picture from Malin Bergman's photo album, daughter of team leader Erik Thorell.

The main motivation in the early 1900s was similar in Sweden, Finland, and Norway: concern over the overexploitation of forest resources. In populated areas, forests had gradually been replaced over centuries by agricultural and grazing land, and parts of southern Sweden and Norway had become treeless or had sparse tree cover. Finland experienced forest degradation due to, among other factors, slash-and-burn agriculture, and human-induced wildfires.

During the nineteenth century, the timber frontier moved northwards as exploitation expanded into the remaining forest areas. In many cases, harvesting took place without regard for regeneration or long-term sustainability, sometimes leaving only sparse remnants of forest. In Norway, Sweden and Finland, growing concern over future wood shortages highlighted the need for reliable information on timber resources and guidance on sustainable forest management.

The inventories were based on similar principles in all three countries. Forest resources were to be described with statistical precision and consistency, and field measurements have remained the backbone of the NFIs since their inception. In the early years, linear sampling along belts spanning entire regions or counties was

used. These methods were later replaced by permanent and temporary sample plots, first along belts and later in clusters. This improved both statistical quality and the efficiency of fieldwork.

The first national inventories were primarily production oriented. Their purpose was to provide comprehensive national and regional assessments of the size, composition, and growth of timber resources. With better knowledge of forest conditions, it became possible to identify policy measures needed to secure future forest growth and the supply of raw material for the forest industry.

Broader scope and new techniques

Over time, society's expectations of forests have broadened. Monitoring biodiversity, forest damage, soil conditions and carbon sequestration has added new tasks to the NFIs. National Forest Inventories have played a central role in providing data for policy decisions at regional, national, and increasingly international levels. Climate reporting to the EU and the UN, for example, relies heavily on NFI data. International forest statistics reported to FAO and Forest Europe are another important example.

Methods based on satellites, laser scanning and lidar have improved dramatically in recent decades. Can field inventories be replaced by remote sensing? Although remote sensing is becoming an increasingly valuable complement, ground-based measurements remain the reference standard. These new technologies cannot fully replace statistically robust field measurements.

Thus, "boots on the ground" still matters, and we would like to thank all the men and women who have done the hard work out in the Nordic forests. Without their efforts, the knowledge that we have sought to distil and present in this report would not exist.

Read more:

Breidenbach, J., Granhus, A.K, Hylen, G., Eriksen, R., Astrup, R. (2020). "A century of National Forest Inventory in Norway – informing past, present and future decisions". *Forest Ecosystems*, 7(1).

Fridman, J., Danell, K. (Eds.). (2024). *Sweden's forests over the last 100 years. The Swedish National Forest Inventory 1923–2023*. Gidlunds förlag.

Korhonen, K.T., Heikkinen, J., Henttonen, H.M., Hotanen, J.-P., Ihalainen, A., Melin, M., Pitkänen, J., Räty, M., Sirviö, M., Strandström, M. (2021). "Forests of Finland 2015–2018 and their development 1921–2018". *Silva Fennica* 55(5).

1. Forest resources

1.1 Key definitions

The definition of **Europe** varies across different sources. In the present report, the European part of Russia is excluded, as well as Turkey, Belarus, Ukraine, Moldova, and Georgia. The main focus is thus on the EU region (27 countries) and countries within the geographic frame of the EU.

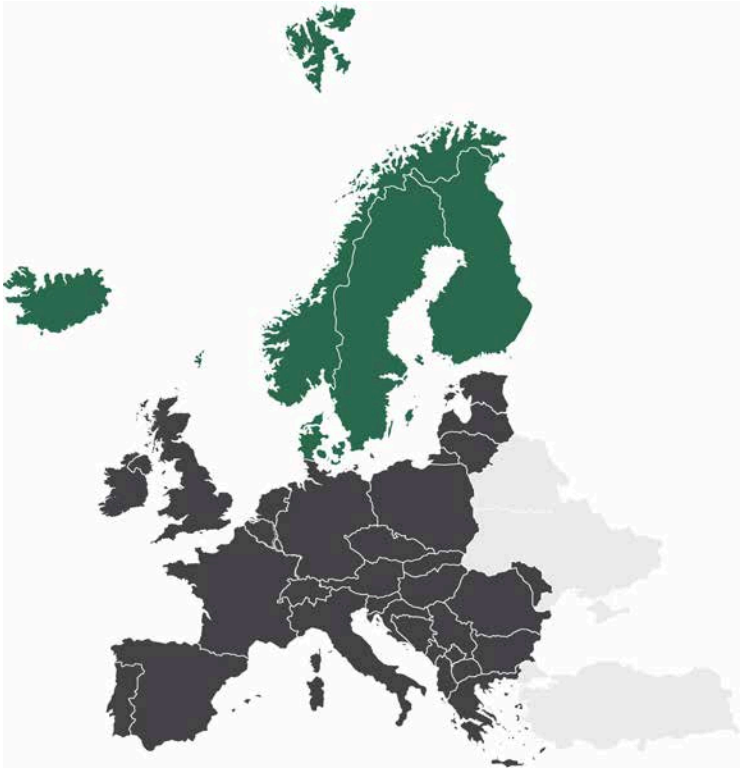


Figure 2: The term "Europe" refers in *Nordic Forest Statistics 2026* to the countries in green and dark grey. This definition differs from that used in State of Europe's Forests, where Europe also includes Turkey, Belarus, Ukraine, Moldova, and Georgia (light grey), as well as European Russia.

A **forest** is land spanning more than 0.5 hectares with trees higher than 5 metres and a canopy cover of more than 10%, or trees able to reach these thresholds *in situ*. It does not include land that is predominantly used for agriculture or urban purposes. This is the joint definition used by FAO and Forest Europe.

Productive forest land is defined as forest area with a growth potential of more than 1 m^3 per year and hectare. **Forest available for wood supply** denotes the forest area where industrial harvest is allowed, i.e., productive forest land except formally protected forest. In Finland, harvest is also allowed on low production forest land (tvinmark), which has a production of 0.1-1 m^3 per hectare and year.

1.2 Forest and land area 2025

The Nordic countries host over one-third of Europe's forest area

Forests in the Nordic countries cover almost 52% of the total land area. More than two-thirds of the land area is forested in Finland (74%) and Sweden (69%), while the shares are considerably lower in Norway (33%) and Denmark (16%) (Table 5). Forest cover in Iceland amounts to approximately 61,000 hectares, corresponding to about 0.6% of the total land area.

The total forest area in Europe is 187 million hectares, of which the Nordic countries account for 34%. The forests of Sweden and Finland alone represent 27% of Europe's forest area (Figure 3). The two countries have the largest forest areas in Europe, followed by Spain, France, Norway, Germany, and Poland (Table 6).

Sweden and Finland also have the highest proportions of land covered by forest, followed by Slovenia, Montenegro, Estonia, and Latvia.

Because the Nordic countries are sparsely populated (Norway: 15 inhabitants/km^2, Finland: 18, Sweden: 26), they have by far the highest forest area per capita in Europe (Figure 4).

The forest area available for wood supply (i.e., forest with a production capacity above 1 m^3 per hectare per year, excluding protected areas) amounts to 47 million hectares across the Nordic countries. Sweden has the largest area (19.4 million hectares), closely followed by Finland (19.3 million hectares) (Table 5).

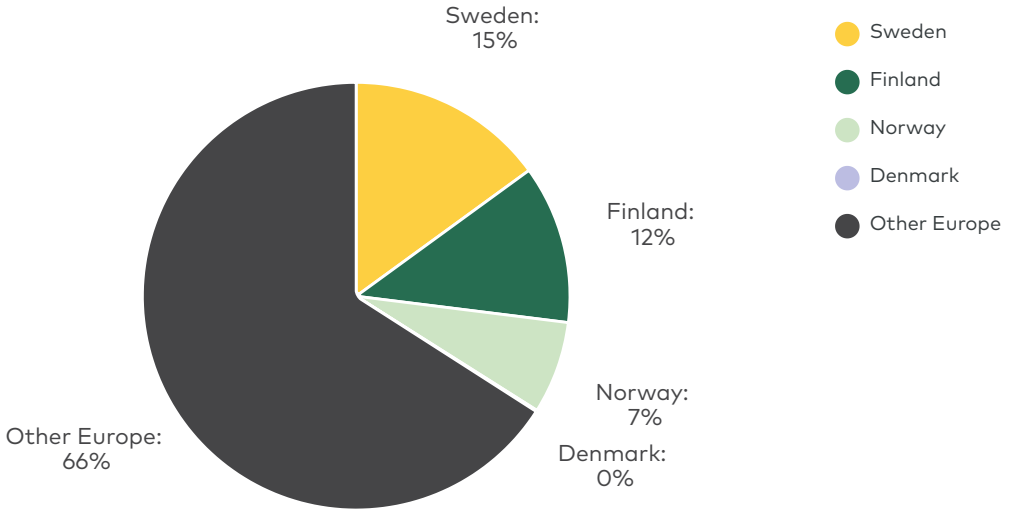


Figure 3: Share of forest land area in Europe. Source: FRA 2025.

Table 5: Forest and land area. 2025, million hectares. Source: FRA 2025 and (for FAWS) SoEF 2025.

	Sweden	Finland	Norway	Denmark	Iceland	Nordic
Forest land	27.9	22.5	12.1	0.64	0.06	63.2
Other wooded land	2.27	0.75	2.1	0.04	0.15	5.34
Other land	10.5	7.10	22.2	3.31	9.9	53.0
Total land	40.7	30.4	36.4	4.24	10.1	121
Forest land share. %	69	74	33	16	0.6	52
Forest available for wood supply (FAWS)	19.4	19.3	8.1	0.54	0.04	47

Table 6: The 10 top countries in Europe with the largest forest land area. Sorted by Forest land area, million hectares. Source: FRA 2025.

Country	Forest land area, million hectares	Forest. share of total land %	Forest land per capita, hectares
Sweden	**27.9**	**68.6**	**2.6**
Finland	**22.5**	**74.2**	**4.0**
Spain	19.1	38.3	0.4
France	17.8	33.0	0.3
Norway	**12.1**	**33.0**	**2.1**
Germany	11.5	32.9	0.1
Poland	9.5	31.0	0.3
Italy	9.4	31.9	0.2
Romania	7.0	30.2	0.4
Greece	4.8	36.9	0.5

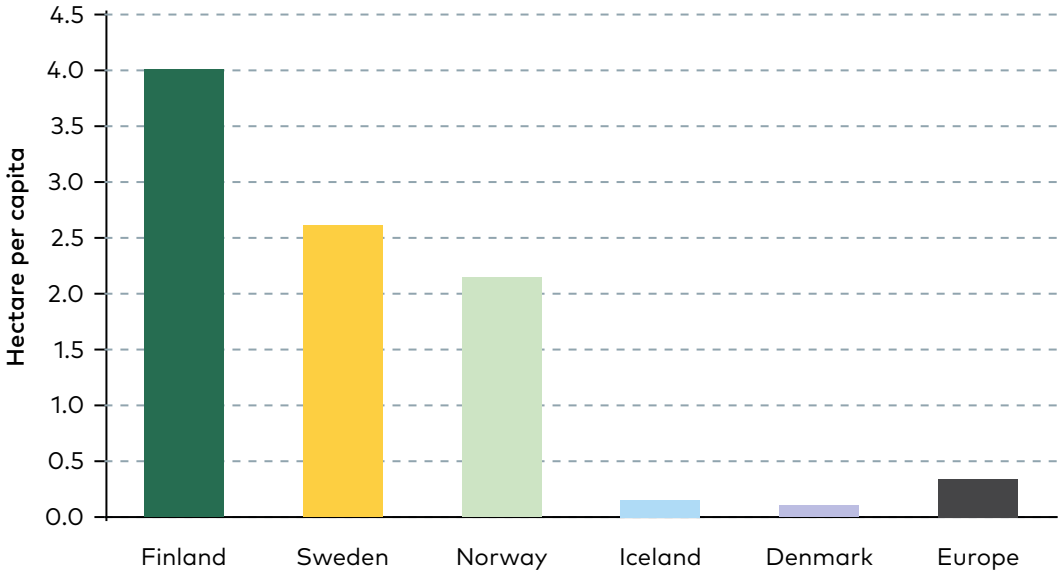


Figure 4: Forest land (hectare) per capita. Source: FRA 2025.

1.3 Growing stock

Over the past century, the growing stock has doubled in Sweden and Finland, and has tripled in Norway. In the past 35 years, the growing stock has increased by 27%.

The growing stock on forest land in the Nordic countries (including protected forests) totals 7.5 billion m³. Sweden has the largest volume, at 3.6 billion m³, followed by Finland at 2.6 billion m³. Since 1990, total growing stock has increased by 27%, from 5.9 to 7.5 billion m³ (Table 7). Finland recorded the largest volume growth, 700 million m³ (an increase of 37% from 1990–2025). Denmark had the largest relative change (up 120% in 35 years), followed by Norway (up 55%).

Europe's total growing stock was 32 billion m³ in 2025, of which the Nordic countries accounted for 24%. Germany has the largest growing stock in Europe, closely followed by Sweden (Table 8).

The growing stock on forest land available for wood supply in the Nordic countries amounts to 6.1 billion m³, corresponding to 82% of total growing stock on forest land.

Table 7: Growing stock on forest land, total amount in million m^3 1990-2025, and m^3 per hectare forest land 2025. Source: FRA 2025 and (for 2025) Luke, Statistisk Sentralbyrå, SLU.

	Sweden	Finland	Norway	Denmark	Iceland	Nordic
1990	3,185	1,878	771	66	0.05	5,900
2000	3,185	2,079	877	92	0.1	6,232
2010	3,295	2,343	1,074	117	0.33	6,829
2015	3,478	2,449	1,151	131	0.52	7,209
2020	3,545	2,537	1,184	133	1.0	7,401
2025	3,552	2,578	1,194	145	1.48	7,470
2025 – m^3 per hectare	127	114	99	226	24	118
Change 1990-2025	+367	+700	+423	+79	+1.4	+1,571
Change 1990-2025 %	+12%	+37%	+55%	+120%		+27%

Table 8: The top ten countries in Europe with the largest growing stock on forest land (2025) and on forest land available for wood supply (2025), sorted by growing stock on forest land, million m^3. Source: FRA 2025 and SoEF 2025.

Country	Forest land		Forest land available for wood supply	
	Growing stock, million m^3	Growing stock, m^3 per hectare	Growing stock, million m^3	Growing stock, m^3 per hectare
Germany	3,660	319	3,390	342
Sweden	**3,552**	**127**	**2,709**	**140**
France	3,028	170	2,906	174
Poland	2,704	285	2,427	279
Finland	**2,578**	**114**	**2,244**	**116**
Romania	2,379	342	1,884	271
Italy	1,335	142	1,248	144
Spain	1,334	70	1,130	68
Norway	**1,194**	**99**	**1,048**	**129**
Austria	1,181	303	1,149	346

The growing stock in the Nordic countries has increased steadily since the National Forest Inventories began in the 1920s. In Sweden and Finland, growing stock has doubled, while in Norway it has tripled. In Denmark, growing stock increased by 67% between 1990 and 2023 (Figure 5).

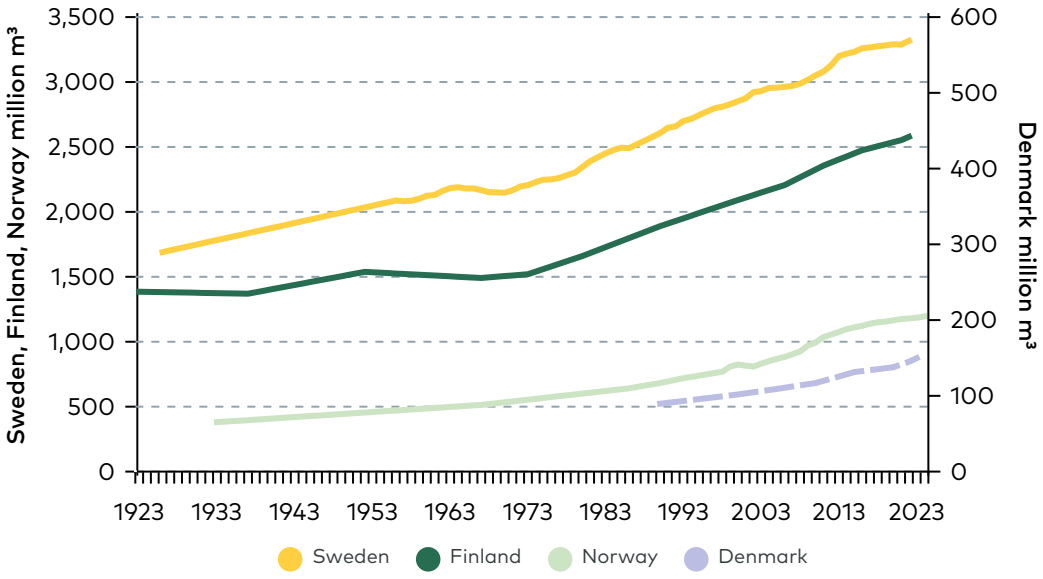


Figure 5: In 100 years, the growing stock has increased twofold in Sweden and Finland, and threefold in Norway. N.B.: Table 7 applies to all forest land. The long-term series for Sweden in this figure applies to productive forest land outside formally protected areas. Sources: Luke, SLU, Nibio, Københavns Universitet 2023.

1.4 Annual increment

Annual increment (volume growth) is reported to Forest Europe (*State of Europe's Forests 2025*). Total annual growth in the Nordic countries' forests amounted to 259 million m³ in 2025, of which 233 million m³ occurred on forest land available for wood supply (Table 9).

Several European countries with substantial forest resources lack complete data for the period, making it impossible to draw firm conclusions about the Nordic share of total European volume growth.

Growth per hectare in Denmark is more than twice that of the other Nordic countries, reflecting its more southerly location, milder climate, and different species.

Average annual growth in northern Sweden (Norra Norrland) is 3.2 m³ per hectare, whereas in southern Sweden (Götaland) it is 6.5 m³ per hectare. Corresponding figures for Finland are 2.6 m³ in the north and 6.4 m³ per hectare in southern Finland.

Table 9: Annual volume growth (increment) on forest available for wood supply 2025. Total volume growth in million m^3. Volume growth per hectare in m^3. Source: SoEF 2025.

	Sweden	Finland	Norway	Denmark	Iceland	Nordic
Total volume growth/year	103.0	97.7	25.8	6.4	–	233.0
Volume growth/ year, hectare	5.3	5.1	3.2	11.8	–	4.9

Annual volume growth on productive forest land has broadly increased in line with growing stock, as illustrated for Sweden, Finland, and Norway (Figure 6). The decline in Sweden and Finland after 2010 is mainly attributed to drought (particularly the dry year 2018), high harvest levels and bark beetle damage. Since the early 2020s, growth has trended upwards in both Sweden and Finland.

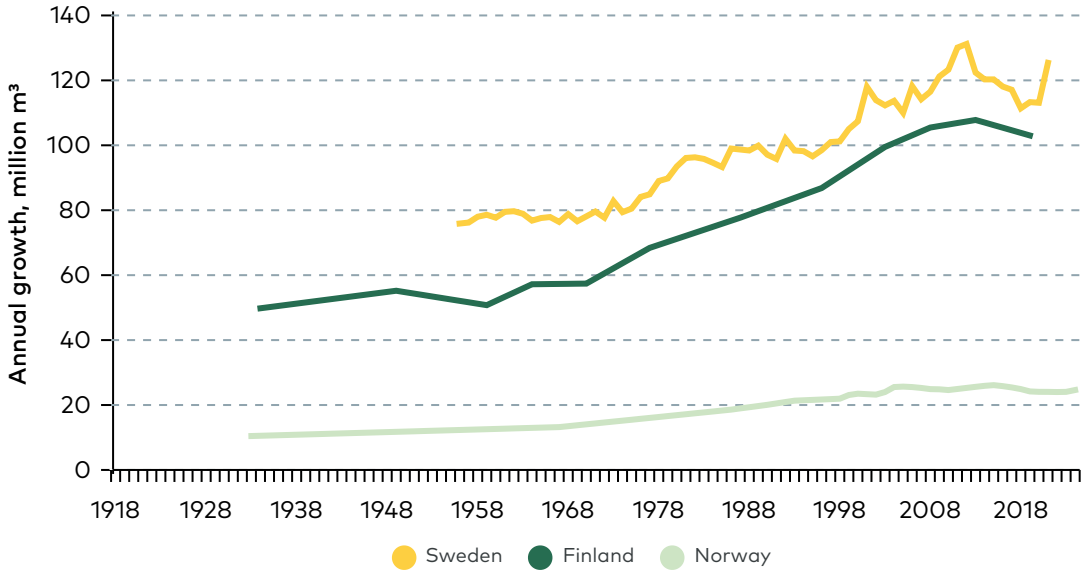


Figure 6: Annual gross growth on productive forest land in Sweden. productive land including low-productive land ("tvinmark") in Finland, and forest land in Norway. N.B.: Table 5 applies to forest available for wood supply, therefore showing lower total growth compared with this figure. Sources: SLU, Luke and Statistisk Sentralbyrå.

1.5 Harvest and growth over 60 years

Although Sweden, Finland, and Norway have harvested timber equivalent to twice the original standing volume over the past 60 years, the standing timber stock is now 70% larger than it was at the start of the period.

Sixty years is a timespan many people can relate to—and in Nordic forestry, it has been nothing short of transformative. In the late 1960s, axes and horses had been replaced by heavy chainsaws. By the 1970s, large machines had taken over, reshaping the forests, and making clear-cutting the dominant harvesting method. Young stands were often treated with chemicals to reduce competition. In the 1980s, the objective was unmistakable: maximise production. Then, in the 1990s, a turning point came. Environmental concerns moved to the forefront, protected areas expanded, and certification systems such as FSC and PEFC began to redefine what sustainable forestry meant.

So, what did all of this add up to?

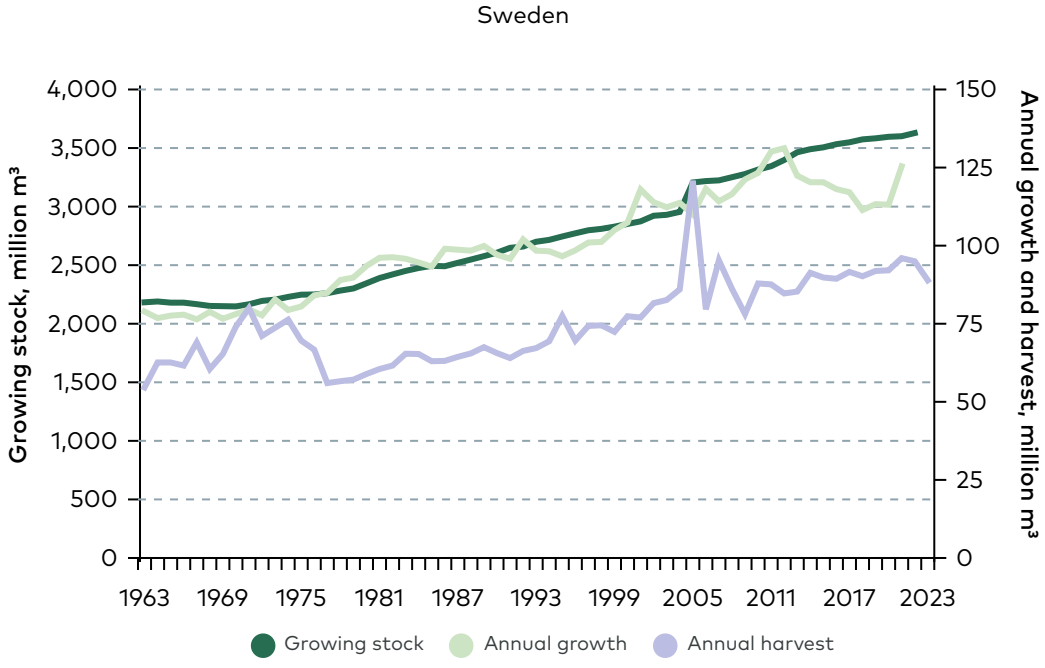
When we compare the total volume harvested over these 60 years with the amount of forest standing at the outset, the result is both surprising and revealing (Table 10, Figure 7). In Sweden, forest owners have harvested almost twice the original standing volume (198%). Yet forests today are not diminished – on the contrary, the standing volume is 52% higher than it was 60 years ago. In Finland, the pattern is even more pronounced. Harvests amount to 214% of the original standing volume, while the forests themselves have grown by 73%. Norway tells a slightly different but equally compelling story: harvests correspond to 153% of the original standing volume, while the forest has expanded even more, with a 136% increase in standing volume.

Taken together, the message is striking (Figure 8). Across all three countries, twice the forest volume that existed in the 1960s has been harvested over the past six decades. And still, the forests have continued to grow. Today, the total growing stock is over 70% larger than it was then – and it is still increasing.

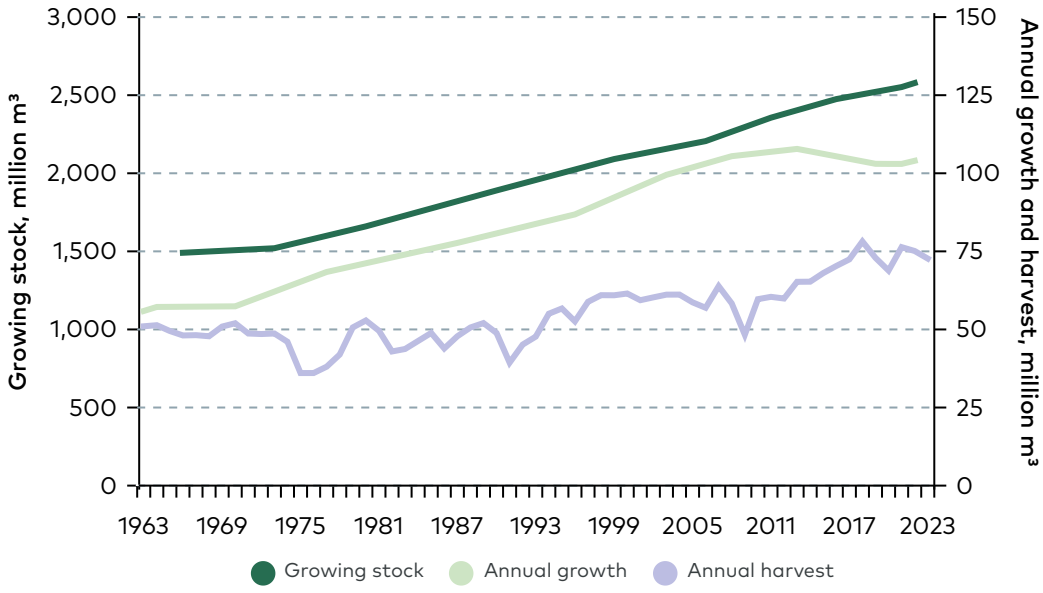
Table 10: Growing stock (Million cubic metres) in 1963 and 2022 (*i.e.*, 60 years), and cumulated harvest during 1963-2022 in percentage of the initial growing stock.

Country	Growing stock 1963	Growing stock 2023	Cumulated timber harvest	Development 60 years, %	
				Growing stock	Harvest
Sweden	2183	3317	4326	+52%	+98%
Finland	1491	2578	3184	+73%	+114%
Norway	481	1218	653	+153%	+36%
Total	4155	7113	8163	+71%	+96%

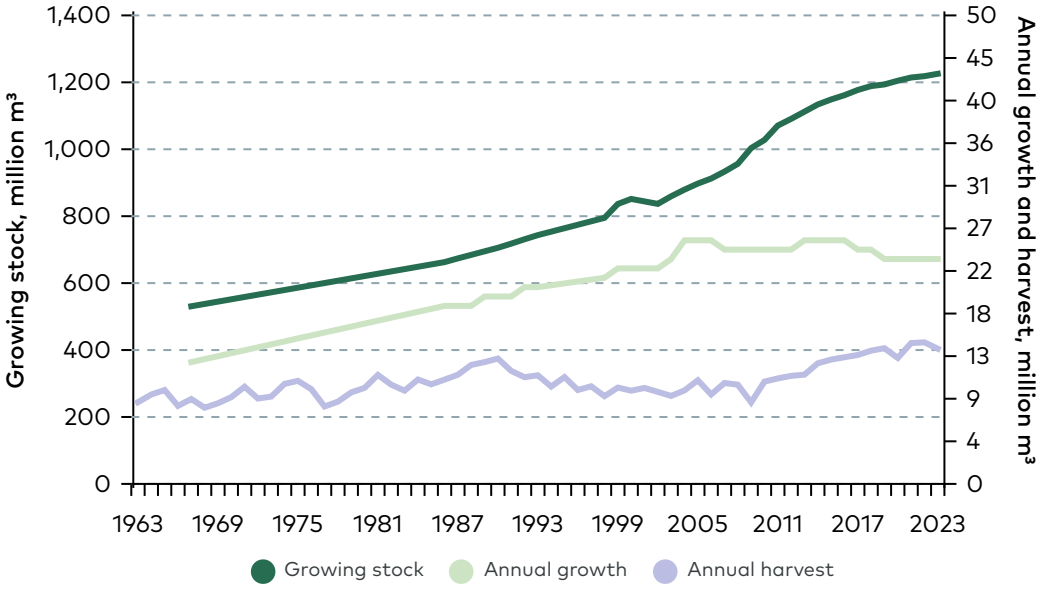
Figure 7: Growing stock (left axis), annual growth and harvest (right axes) during the 60-year period 1963-2023. Sources: SLU, Luke, Nibio.



Finland



Norway



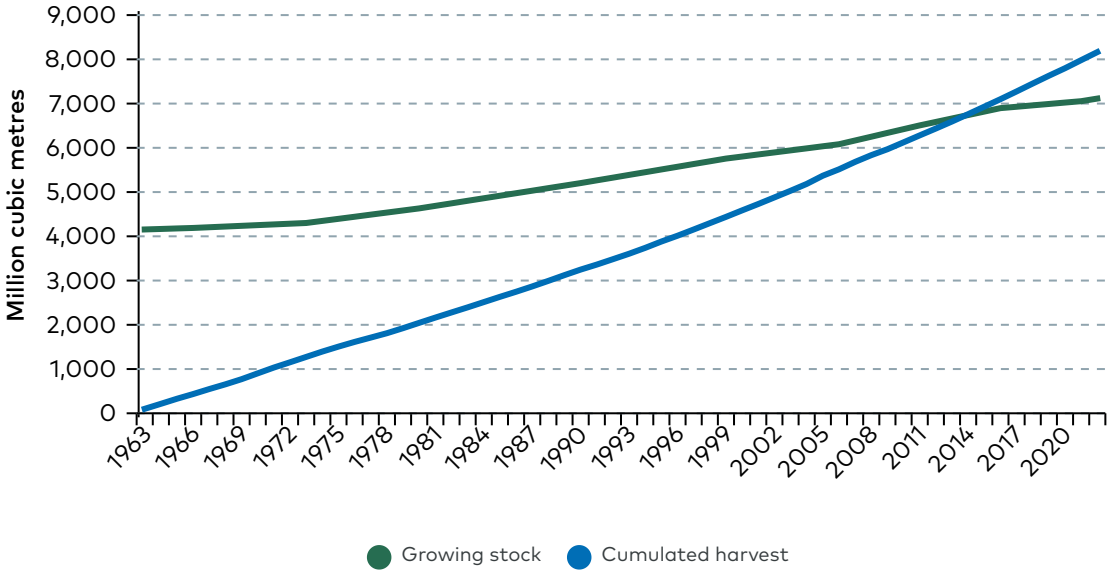


Figure 8: Growing stock and cumulated harvest in million cubic metres during the sixty year period 1963-2022. Sweden, Finland and Norway combined. Sources: SLU, Luke, Nibio.

1.6 Tree species

Pine, spruce, and birch account for 92% of the growing stock in the Nordic countries

Scots pine (*Pinus sylvestris*) and Norway spruce (*Picea abies*) dominate Nordic forests, with standing volumes of 3.0 and 2.7 billion m³, respectively (Figure 9). Together, they account for 77% of the total growing stock across the five Nordic countries.

Birch (*Betula pubescens* and *B. pendula*) is the most common broadleaved species group, representing 15% of total volume.

Since the previous edition of *Nordic Forest Statistics*, Scots pine has surpassed Norway spruce as the most abundant tree species in Sweden by volume.

Denmark stands out for its more diverse species composition. Introduced species account for 36% of growing stock, with the most common being Norway spruce (15%), Sitka spruce (*Picea sitchensis*, 6.7%), larch (*Larix* spp., 3.3%) and silver fir (*Abies alba*, 2.5%). However, the single most common species is beech, representing 26% of standing volume.

Iceland also has a high share of introduced tree species (90%) for historical reasons. The most common species are larch (*Larix sibirica*, 32%), lodgepole pine (*Pinus contorta*, 18%), Sitka spruce (16%) and black cottonwood (*Populus trichocarpa*, 13%). The only reported native tree species in Iceland is birch, which accounts for 10% of forest area.

Finland is almost entirely dominated by native tree species (99.9%). Sweden and Norway have 1.5% and 1.3% introduced species, respectively. In Sweden, this is mainly lodgepole pine, while in Norway it is primarily Sitka spruce.

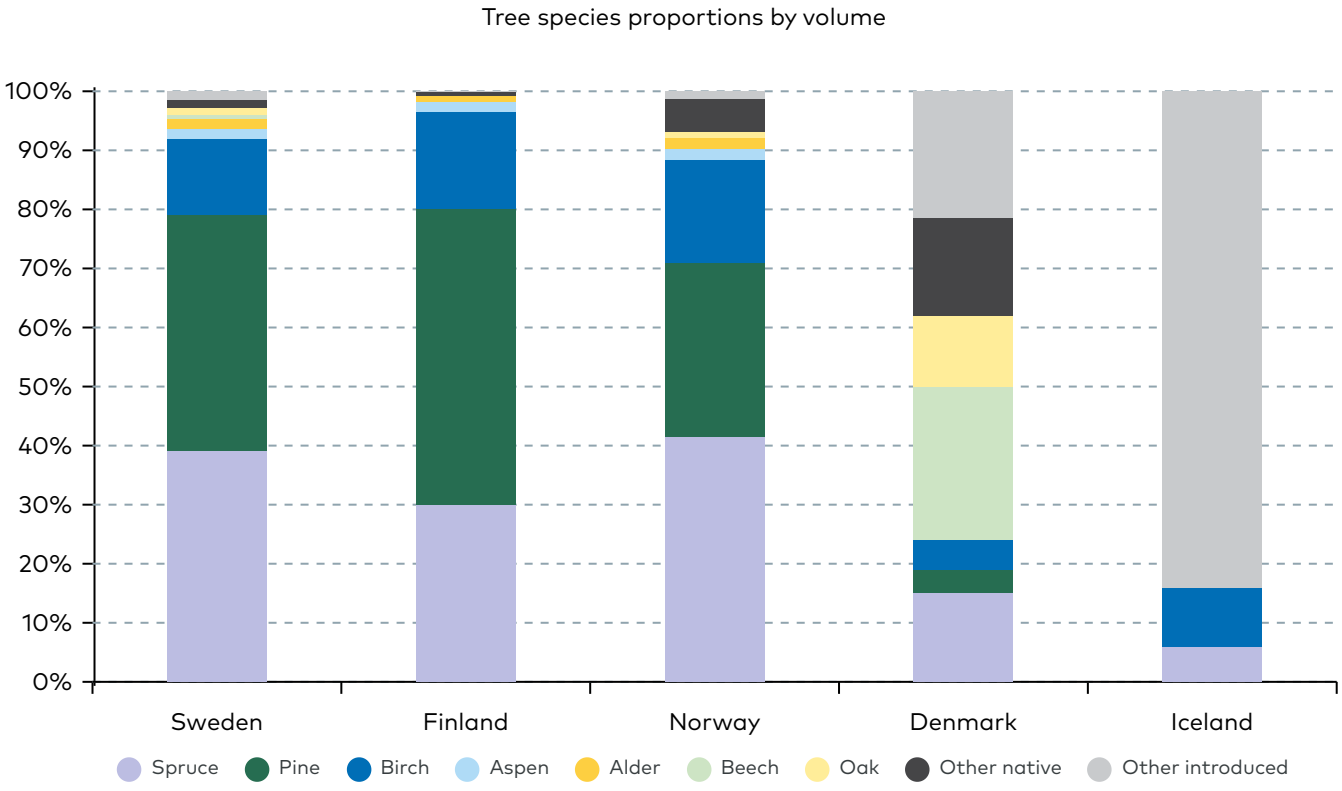


Figure 9: Tree species mixture in the Nordic forests. Data from FRA 2025, Country reports. "Spruce" is Norway spruce, "Pine" is Scots pine.

Broadleaves

Denmark is the Nordic country with the highest share of broadleaved trees, with 43% of the current growing stock being broadleaves, although the volume is quite small compared to the other Nordic countries. The total stock of broadleaved trees in Sweden, Finland and Norway increased by 66% from 1967 to 2022. The percentage of broadleaves compared to the total standing volume increased in the same period from 16% to 20% (Figure 10).

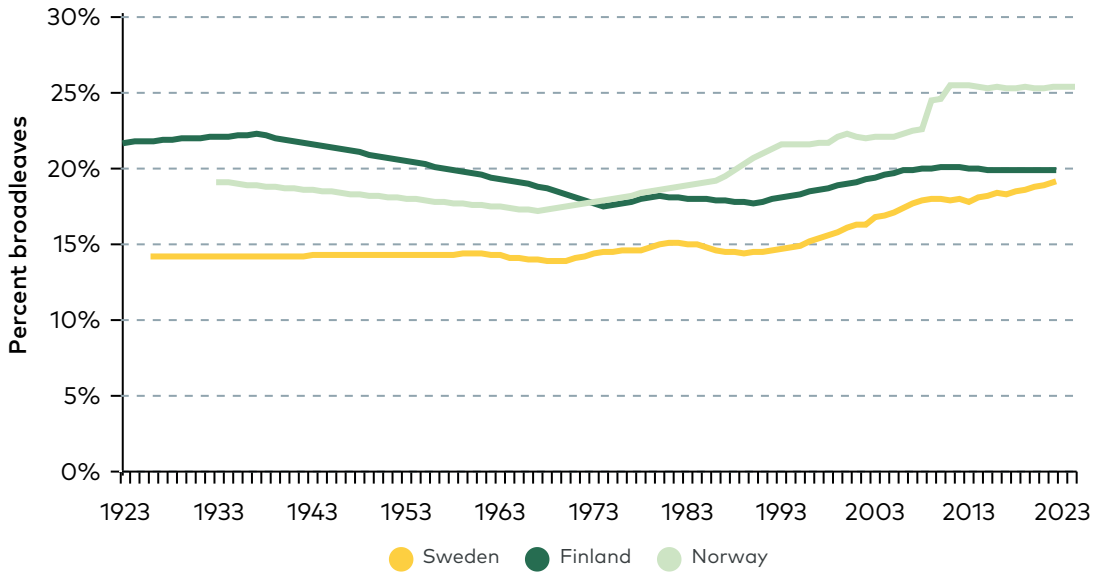


Figure 10: Percentage of growing stock composed of broadleaves in Sweden, Finland, and Norway over a century. The steep increase in Norway in 2005 may be explained that the northernmost county (Finnmark) was included in the NFI, with a high percentage of birch trees. Source: SLU, Luke, Statistisk Sentralbyrå.

Dominant tree species in Europe

In the Nordic countries, only 1.7% of the forest area is composed of introduced tree species.

Across Europe, Norway spruce is the dominant native tree species (in terms of growing stock in production forests) in Norway, Austria, Germany, Switzerland, and the Czech Republic. Scots pine dominates in north-eastern Europe and in Spain, while maritime pine (*Pinus pinaster*) is the leading species in Portugal. In southern and south-eastern Europe, the most common native tree species are various oaks (*Quercus robur*, *Q. petraea* and *Q. cerris*) together with beech (*Fagus sylvatica* and *F. moesiaca*) (Figure 11).

In some countries, introduced species dominate over the native. Norway spruce is considered introduced in Belgium, where it is the most common species. Siberian larch is the most common species in Iceland, followed by lodgepole pine and Sitka spruce. Sitka spruce is the most common species in Ireland and the United Kingdom. *Robinia pseudoacacia* is the most common species in Hungary.

The share of introduced species in total growing stock is highest in Iceland (90%), followed by Ireland (85%), the United Kingdom (60%) and Belgium (45%). Denmark has 36%, Sweden 1.5%, Norway 1.3%, and Finland only 0.1% (Figure 12). Across the Nordic region, introduced species account for 1.7% of total growing stock.

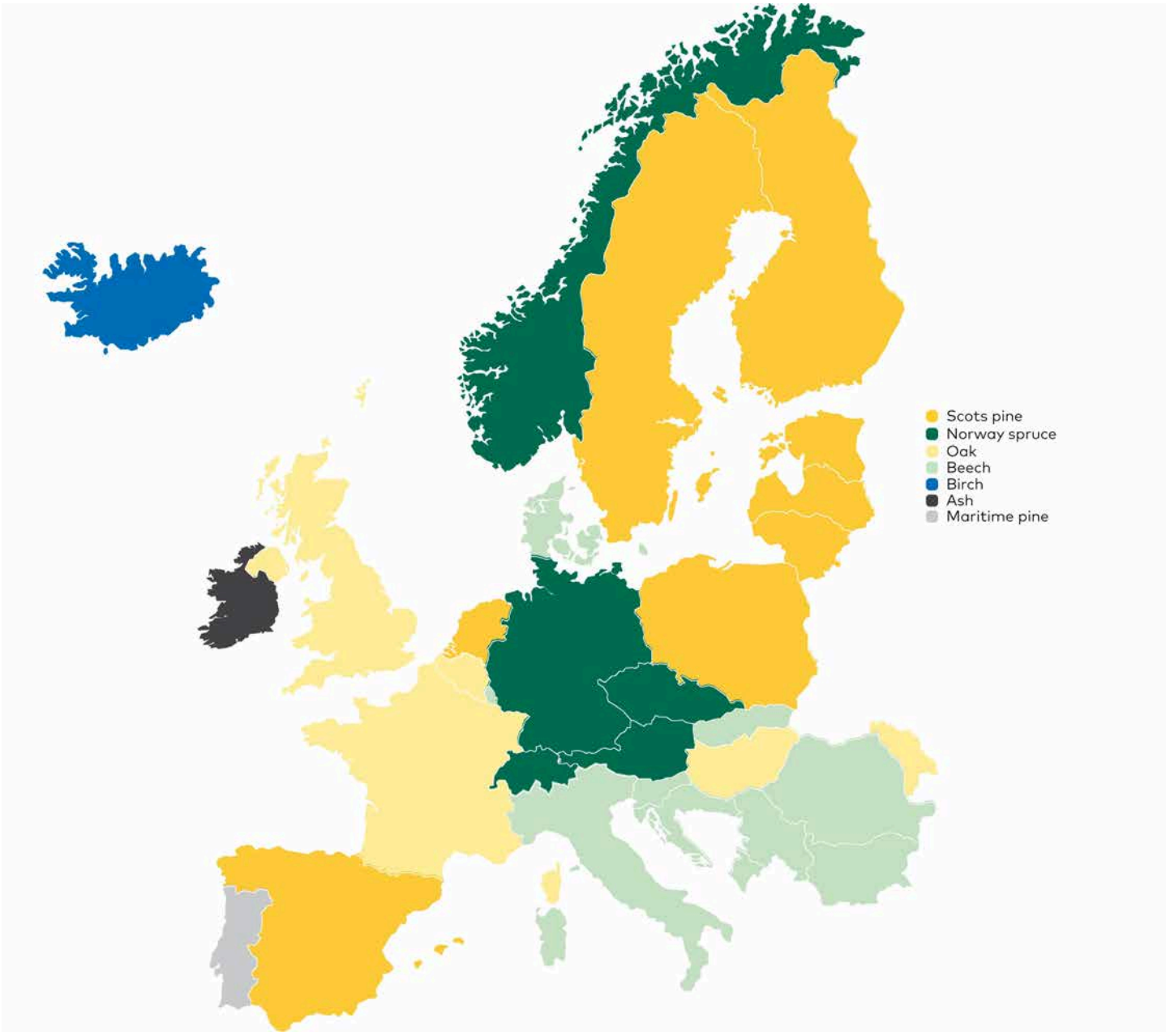


Figure 11: The countrywide most common native tree species as share of growing stock. Source: FAO Country reports 2025.

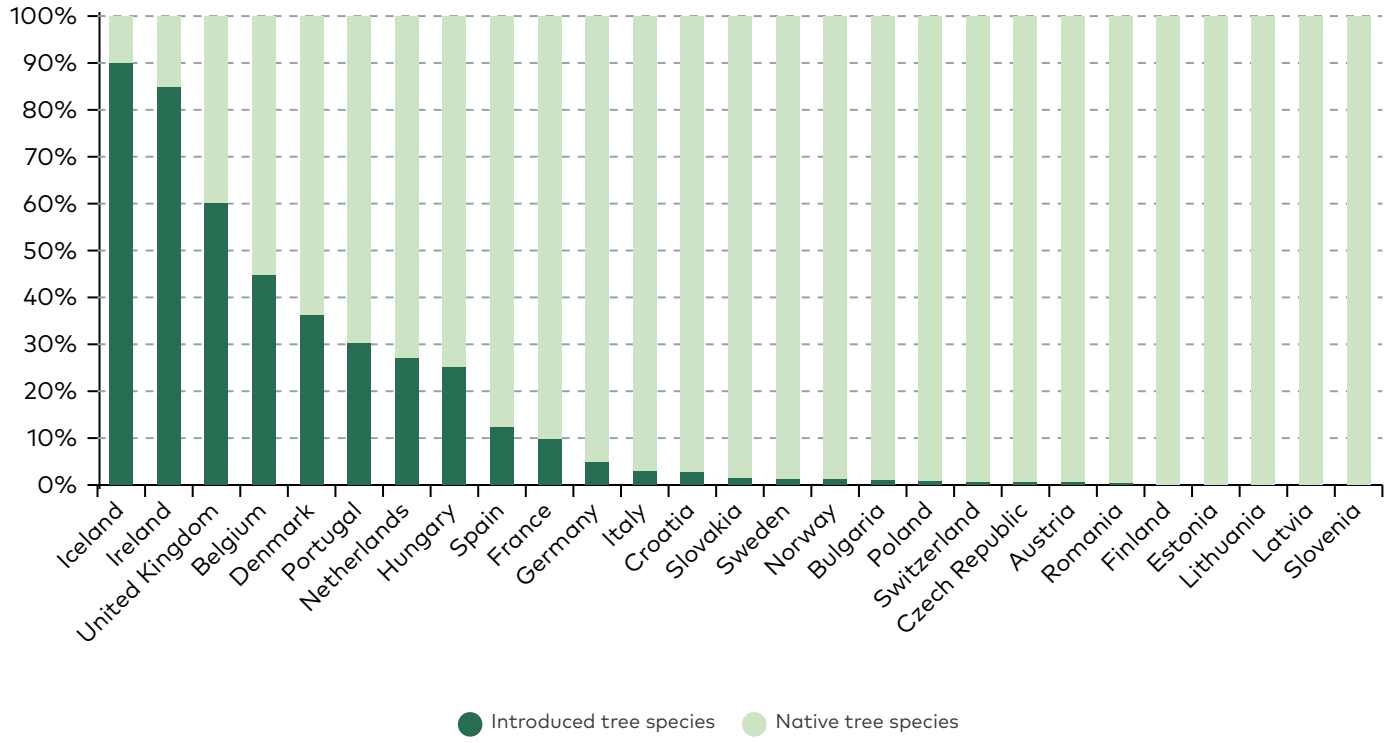


Figure 12: Share of introduced tree species in European countries. Source: FRA/FAO Country reports 2025.

1.7 Forest regeneration

Every year, more than 660 million seedlings are planted across the Nordic countries

Regeneration methods

Compared with many other parts of Europe, the Nordic countries rely heavily on planting and seeding, which together account for 82% of all regeneration measures.

The total regenerated area in 2025 amounted to 430,000 hectares, with Sweden and Finland together accounting for 377,000 hectares.

Natural regeneration, which was more common in Finland, Sweden, and Norway during the 1990s, has declined to an average of 18% in the Nordic region (SoEF 2025).

Afforestation, meaning the expansion of forest area onto non-forest land, is particularly important in Iceland and Denmark.

Seed and seedling production

NordGen (Nordic Genetic Resource Centre) compiles statistics on seedling and seed production across the Nordic countries (NordGen 2025). Table 11 presents the number of seedlings delivered to forest owners in 2023. Data for Denmark were unavailable.

Sweden had by far the highest production, with 431 million seedlings, followed by Finland (175 million), Norway (50 million) and Iceland (7 million).

Scots pine has surpassed Norway spruce as the main species planted in Sweden. Together, these two species accounts for 96% of all seedlings produced (Figure 13).

In Finland, 60% of seedlings were Norway spruce and 34% Scots pine, while in Norway 91% were Norway spruce.

Compared with conifers, broadleaved species still account for a small but growing share. In 2023, Finland produced 9 million birch seedlings, while Sweden produced 3.2 million.

Iceland differs from the other Nordic countries, with 22% native birch (*Betula pubescens*), followed by lodgepole pine (20%), Siberian larch (10%), Sitka spruce (7%) and black cottonwood (4%).

Table 11: Number of seedlings delivered to forest owners in 2023 (million seedlings). Source: NordGen.

	Sweden	Finland	Norway	Iceland
Seedlings, million	431	175	50	6.7

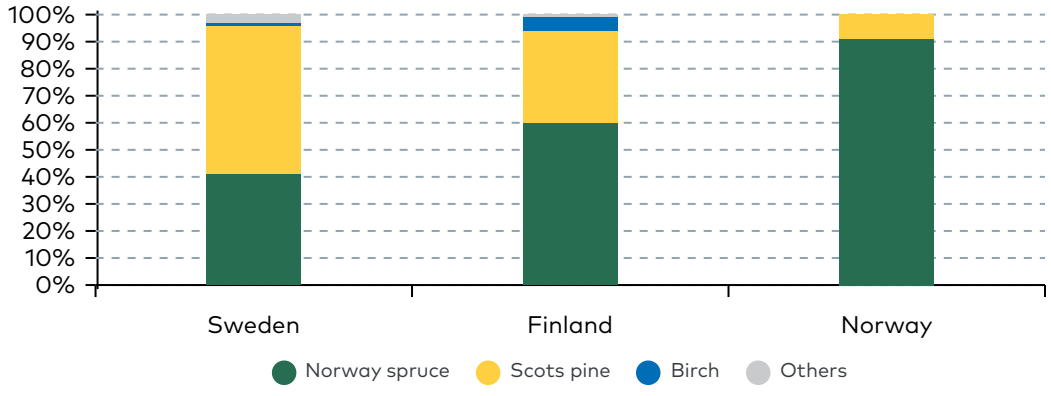


Figure 13: Seedling production, percentage of tree species. Source: NordGen, data from 2023.

Almost all seedlings are genetically improved, meaning that the planting material has either been selected based on phenotype or tested for superior performance in growth, quality, health, and adaptation to a future climate (Table 12).

Improved reforestation material typically yields 10–25% higher production than unimproved domestic material.

Almost all planting material is sexually generated with seed. Clonal forestry using genetically engineered trees is not used in the Nordic countries.

Table 12: Percentage of produced seedlings that were genetically improved in 2023. Source: NordGen.

	Norway spruce	Scots pine	Birch
Sweden	93	99	94
Finland	98	98	100
Norway	94	81	96
Iceland			13

2. Forest and people

2.1 Forest ownership

56% of Nordic forest land is owned by small-scale private owners.

The Nordic countries have a large share of privately owned forest land, with a majority held by small-scale private owners (Figure 14). Publicly owned forest area constitutes 39% of the total forest area in Europe, compared with only 25% in the Nordic countries. Among privately owned forests, individuals (small-scale owners) dominate, accounting for an average of 56% of forest land.

The highest share of small-scale forest owners in Northern Europe is in Norway (72%), followed by Iceland (63%), Finland (59%), Denmark (55%), and Sweden (47%). If only productive forest land is considered, small-scale private owners account for 78% in Norway, 48% in Sweden, and 60% in Finland.

Sweden has the highest share of private company-owned forest land (24%). The company SCA (2.7 million hectares) is considered the largest private forest-owner company in Europe. However, the state-owned company Sveaskog is the largest landowner in Sweden (4 million hectares, of which 3 million hectares are productive forest land).

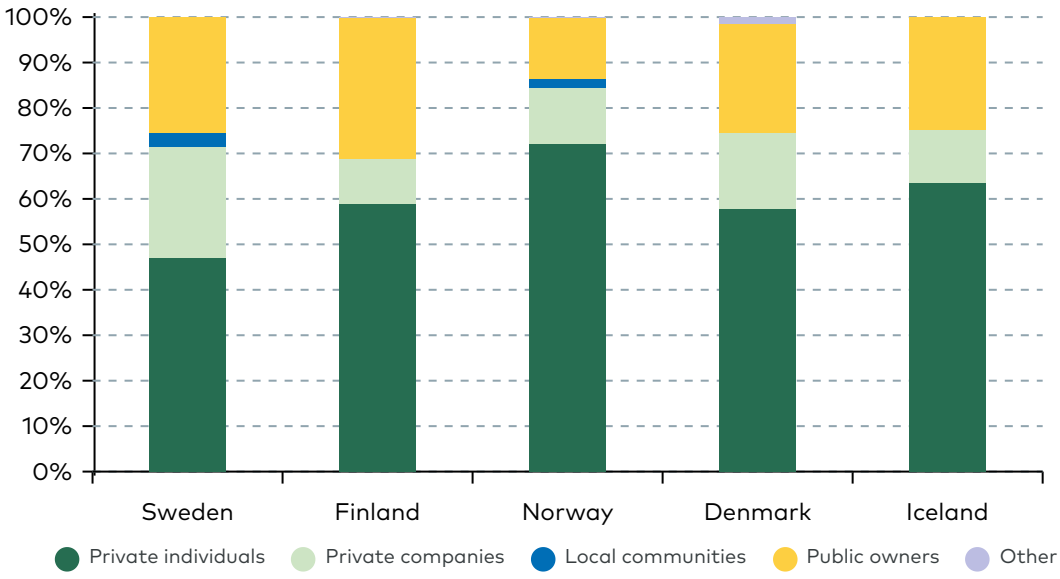


Figure 14: Forest ownership, percentage of area, in the Nordic countries. Source FRA 2025 and (for Norway) Statistisk sentralbyrå.

The private forest owner

Over 700,000 small-scale owners make the everyday decisions about forest management in the Nordic countries. They provide over 70% of the timber supply and contribute to a variety of silvicultural practices.

Everyday decisions about forest management in the Nordic countries are largely in the hands of small-scale private owners (often referred to as family foresters), each with their own preferences and circumstances. Privately owned forests are generally more productive and account for a larger share of the national timber supply than their share of total forest area would suggest: 89% in Norway, 59% in Sweden, and 80% in Finland (Karppinen 2020).

The number of forest owners is highest in Finland, where 14% of the population owns forest land, either individually or through consortia. Across all countries, many properties are owned by more than one person (usually spouses), so the number of properties is lower than the number of forest owners (Table 13). The average property size is 34 hectares in Sweden, 31 hectares in Finland, and 57 hectares in Norway (Skogsstyrelsen, Forest News 2019, Statistisk sentralbyrå).

Although many properties are small, large holdings account for a substantial share of privately owned forest land. In Sweden, for example, only 8% of private forest owners hold more than 100 hectares, yet they own 52% of the small-scale privately owned forest area. Over time, the number of properties has declined while their average size has increased. In Sweden, the proportion of privately owned forest land held in holdings larger than 100 hectares rose from 40% in 1999 to 52% in 2024. The share held in properties larger than 400 hectares doubled from 9% in 1999 to 18% in 2024 (Skogsstyrelsen).

Forest owners are ageing. In Sweden, the mean age rose from 55 to 61 years between 1999 and 2024. In Finland, the share of owners aged over 65 years rose from 30% in 1999 to 50% in 2019 (Karppinen 2020).

Table 13: Data about individual forest owners in Sweden, Finland, Norway, and Denmark.

	Sweden	Finland	Norway	Denmark
Number of holdings	219,000[4]	350,000[5]	126,000[6]	29,000[7]
Mean property size, ha	34	30.5	57	
Number of forest owners	309,000	620,000	121,000	
Percent women	39%[8]	41%[9]	25%[10]	

2.2 Gender equality

Forestry and the forest industry are male-dominated sectors throughout Europe. In 2015, 82% of those employed in forestry were men, while the corresponding figure in wood manufacturing was 81% (SoEF 2020).

Among small-scale forest owners, the proportion of women is 39% in Sweden, 41% in Finland, and 25% in Norway. In Denmark, 14% of owners were reported to be

4. Skogsstyrelsen. "Antal brukningsenheter ägda av fysiska personer efter region. År 1999-2025".
5. Calado 2019. "Finnish Forestry (2) – Forest owners and investment support"
6. Statistisk Sentralbyrå. "Statistikk om skogeiendommer".
7. PEFC.
8. Skogsstyrelsen. " Jämställdhet i skogen".
9. Kuhlman 2024. *Challenging the concept of active forest ownership: the perspective of women forest owners in Finland.*
10. Vennesland et al. 2020. "Gender balance in the Nordic forest sector".

women, although these data are from 2003 (Vennesland et al. 2020). However, women own smaller holdings on average. In Sweden, the mean size of women-owned properties was 25 hectares, compared with 40 hectares for men in 2024 (Skogsstyrelsen 2025).

Sweden compiles statistics on gender equality indicators (Table 14). The proportion of women is higher in longer educational programmes than in shorter ones, and women also tend to hold a higher share of senior positions in the forest sector.

Table 14: Percent women and men according to equality indicators in Sweden 2024 (Skogsstyrelsen 2025).

	Women	Men
Students entering forest workers program	16%	84%
Students entering long programs at the Swedish University of Agricultural Sciences	33%	67%
Students entering long programs at the Linnaeus University	52%	48%
Forest machine operators	3%	97%
Forest timber buyers or inspectors	14%	86%
Top management team in companies and organizations	42%	58%

2.3 Employment in the forest sector

According to Eurostat, the number of people employed in forestry and the forest industry in 2023 was 69,000 in Sweden and 55,000 in Finland (Table 15). Employment figures vary by statistical source. In Sweden, for example, the total number of full-time employees was 123,000 when self-employed and part-time workers are included (Skogsindustrierna 2025). In Finland, the entire forest sector employs nearly 100,000 people when indirect jobs, such as logistics and services, are also considered (Finnish Forest Industries 2023).

Table 15: Annual working units (full-time work) and employed in the forest sector in 2023, according to Eurostat. Thousand persons. The peaks in 2005 and 2007 are due to large stormfellings.

	Sweden	Finland	Norway	Denmark	EU27
Annual working units, employed	42	26	5,5	4,3	472
Annual working units, self-employed	26	10	2,6	1,6	na
Employed forestry, logging	24	18	6,3	2,6	451
Employed wood manufacturing	22	22	9,7	6,3	945
Employed paper and paper products	23	15	na	4	622

3. Forest harvest

3.1 Timber harvest

A third of the total timber harvest in Europe occurred in the Nordic countries.

In 2024, the Nordic countries harvested just over 140 million m³ of timber (solid volume), including timber for industrial and energy use (Table 16). This was slightly below the past decade average but 7% above the 30-year average. The region accounted for approximately 35% of total European harvests – a share that has remained stable over the past three decades.

Sweden dominates Nordic industrial timber removals, accounting for just over half of the total, followed by Finland (40%), Norway (9%), and Denmark (1%). Over the past five years, harvests have increased in Finland (+3.5 million m³) and Norway (+1.7 million m³), while Sweden has declined by 3.7 million m³. Norway has reached record-high harvest levels, supported by rising log exports, primarily to Sweden (Figure 15).

Table 16: Industrial timber harvests (sawn timber and pulpwood) in the Nordic countries in 2024 and 30-year average (solid volume). he peaks in 2005 and 2007 are due to large stormfellings. Note: Harvest data represents industrial timber removals (no logs for energy), measured as solid volume. Sources: Statistics Denmark, Statistisk Sentralbyrå, Luke, Statistics Sweden, FAO and estimates from Global Woods Trends.

	Harvest 2024	30-y average	2024 vs. 30-y
	Mn m^3	Mn m^3	Percent
Sweden	70.4	70.0	1%
Finland	55.4	50.1	11%
Norway	12.5	9.3	34%
Denmark	1.8	1.6	11%
Nordic	**140.2**	**131.1**	**7%**
Europe	**398**		

Industrial timber supply from the Nordic countries accounted for about a third of Europe's total log supply in 2024. This share has been surprisingly stable over the past few decades, despite substantial increases in timber harvests in Central Europe, which were driven by occasional storms and prolonged insect infestations for over 15 years.

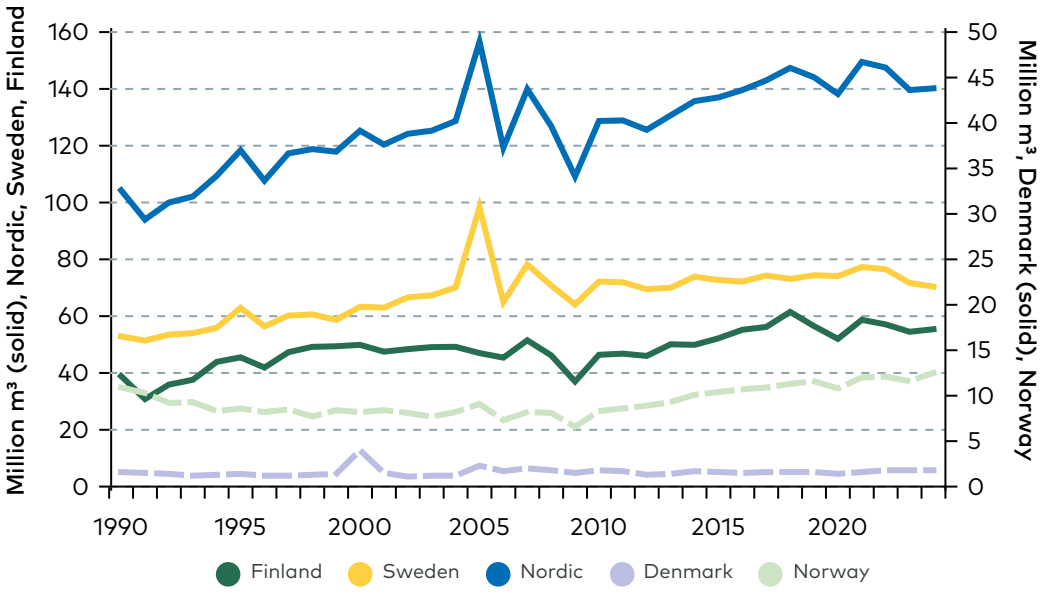


Figure 15: Timber harvest (sawn timber and pulpwood) 1990-2024, solid volume. N.B.: Norway and Denmark on the righthand axes. Sources: Statistics Denmark, Luke, Statistisk Sentralbyrå, Skogsstyrelsen, UNECE, FAO and GWT estimate.

Timber harvest assortments

Across the Nordic countries, harvested assortments vary considerably despite broadly similar climatic conditions (Figure 16). These differences can be attributed to a combination of historical harvesting regimes, tree species composition, thinning practices, and industrial structure.

Norway's high proportion of sawlogs (60%) is linked to historically low thinning intensity and a comparatively less developed pulp industry. Finland, by contrast, has a higher share of pulpwood (64%), a larger proportion of middle-aged pine stands, and a highly developed pulp and paper sector. Finland is also the only Nordic country with a commercial birch saw timber industry, supported by the availability of higher-quality birch resources.

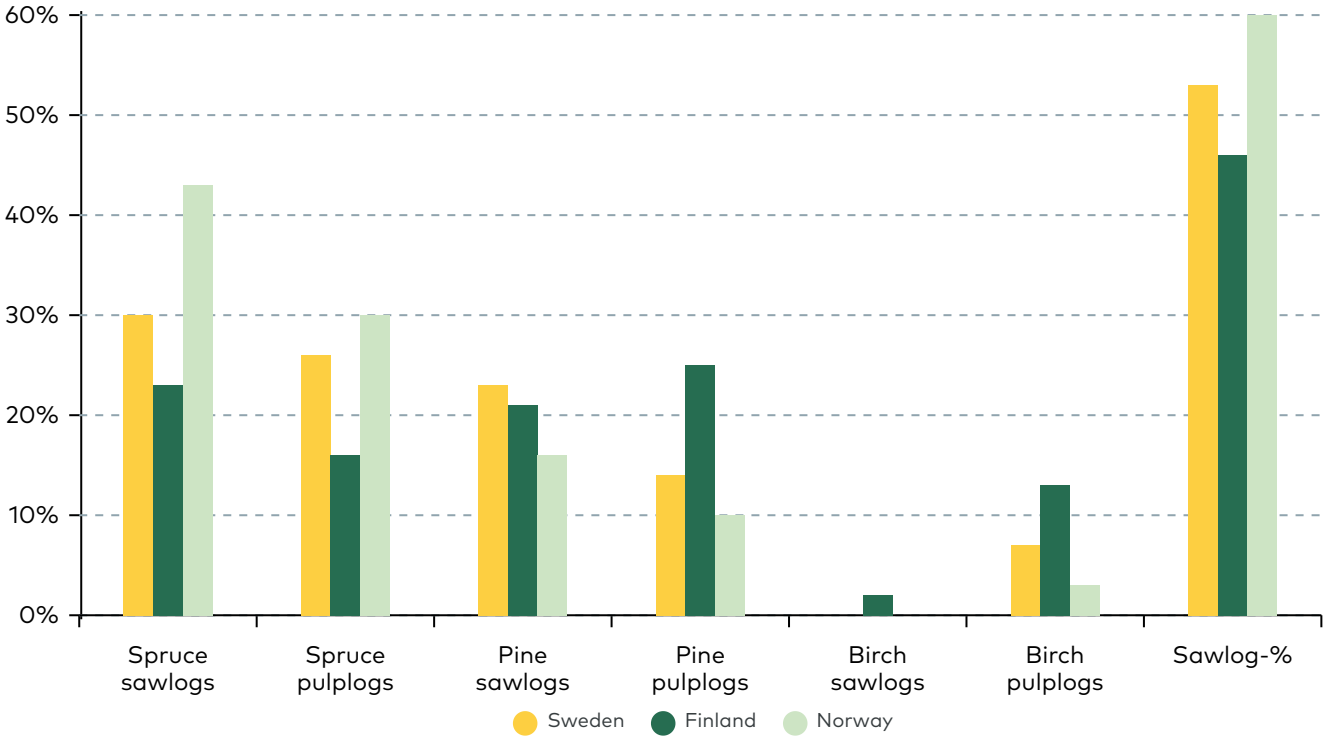


Figure 16: Assortment distribution (%) and the proportion of saw timber (%) in timber harvested in 2024, excluding energy wood, in Norway, Finland, and Sweden. Sources: Luke, Statistisk Sentralbyrå, Skogsstyrelsen.

3.2 Clear-cut size

Rotation forestry with clear-felling dominates, but average clear-cut sizes have decreased over time to less than 3.5 hectares in Sweden and 1.5 hectares in Finland and Norway.

Rotation forestry with clear-felling dominates in Sweden, Finland, and Norway. The average clear-cut area is 3.6 hectares in Sweden, 1.5 in Finland and 1.4 in Norway. Clear-cut sizes increase towards the north of Sweden and Finland, and small-scale private forest owners generally have smaller clear-cuts than private companies and public owners. For example, small-scale owners in southern Finland have an average clear-cut size of 1.2 hectares, compared with 3.1 hectares for other owners in northern Finland. In southern Sweden, where ownership is predominantly small-scale private, the average clear-cut size is 2.5 hectares, while in northernmost Sweden, where public and company ownership dominates, it is 5.6 hectares.

It should be noted that small clear-cuts (<0.5 hectares) are not included in the statistics for Sweden, as they can be carried out without permission. The average clear-cut size should therefore be lower than the figures above.

Clear-felling sizes in publicly and company-owned forests have declined since the 1990s, as shown by data from Sweden (Figure 17). Despite the lower average size, larger clear-fells still account for a significant share of the harvested area (Figure 18).

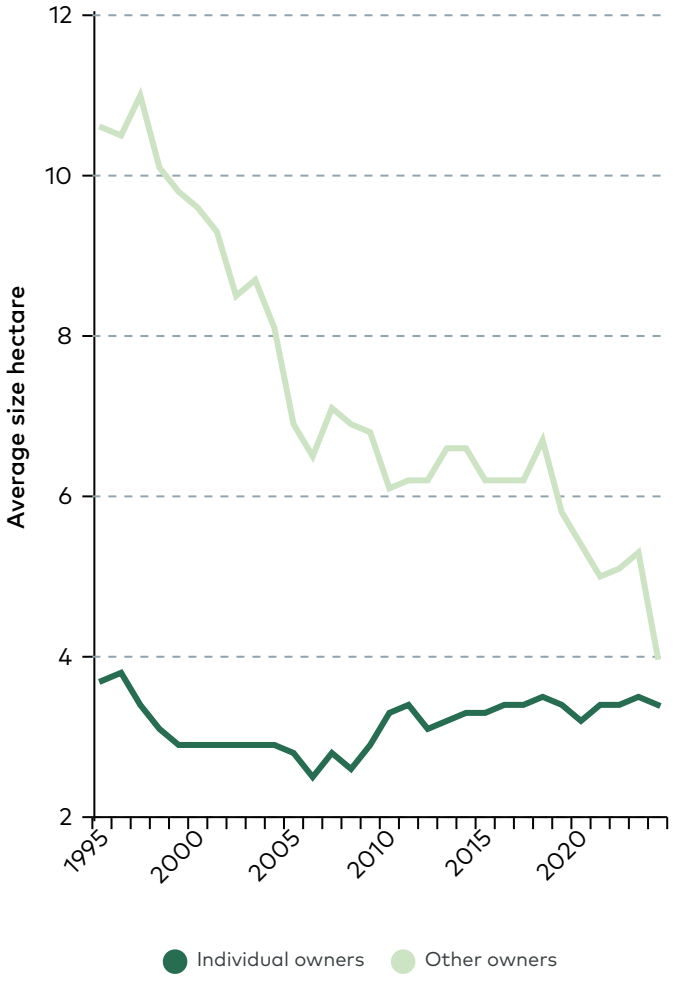


Figure 17: Clear-cut sizes 1995-2024 for individual owners and other owners (mostly companies) in Sweden. Source: Skogsstyrelsen.

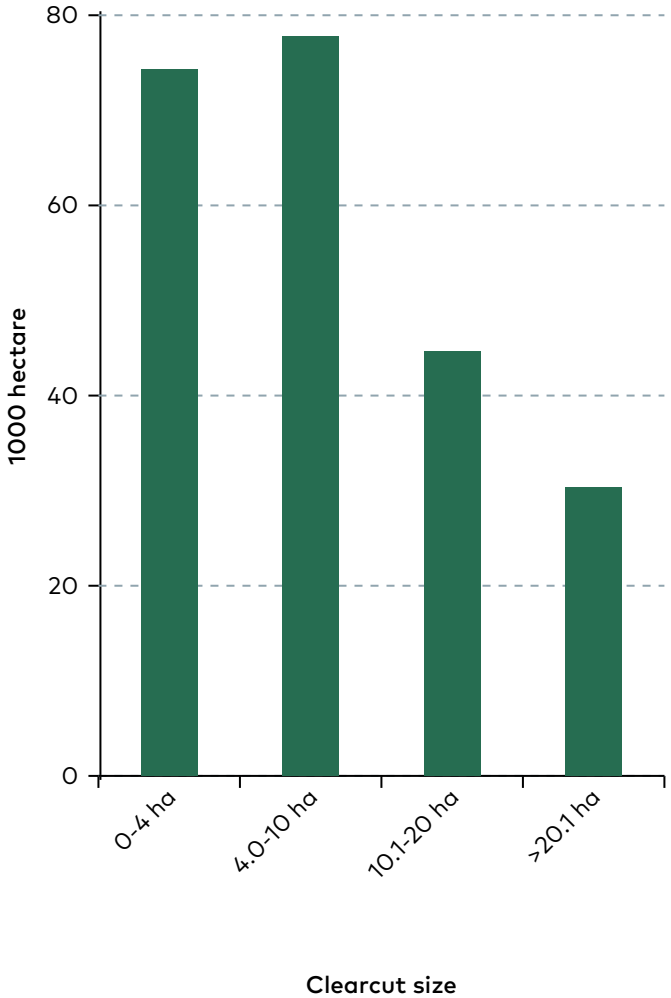


Figure 18: Clear-cut area 2024 in Sweden separated on clear-cut sizes. Source: Skogsstyrelsen.

3.3 Renewable and biomass energy

Biobased energy is the largest share of total energy supply in Finland (38%), Denmark (37%) and Sweden (34%). The vast majority comes from forest residues.

All Nordic countries have a high share of their energy supply from renewable sources (bioenergy, hydropower, wind, solar and geothermal energy). In 2024, Iceland had the highest share at 90%, followed by Sweden at 58% and Norway at 55%. Overall, the Nordic countries derived 57% of their total energy supply from renewable sources (Table 17).

In the EU, 24% of the total energy supply came from renewable sources in 2024 (Table 17, Figure 19). The fossil share of the energy supply was 74% in the EU and 37% in the Nordic countries. In 1990, it was 82% and 61%, respectively.

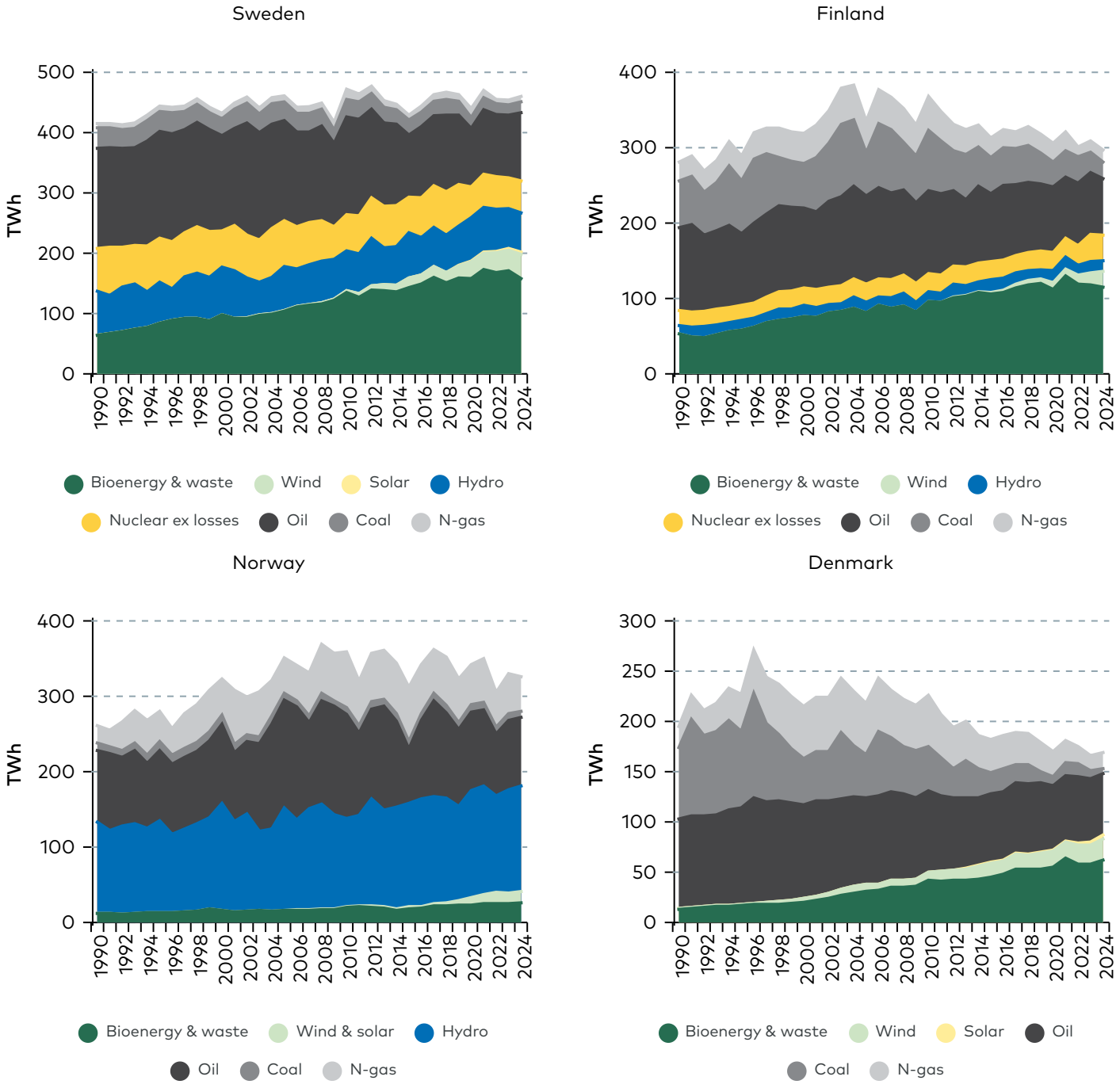
Across the Nordic countries, total energy supply rose from 1,179 TWh in 1990 to 1,324 TWh in 2024, a 12% increase. The most significant change has been the growing share of renewables (from 31% to 57%) and fossil-free energy (from 39% to 63%). In the EU, the corresponding shares rose from 5% to 24% for renewables and from 18% to 40% for fossil-free energy. Bio-based energy accounts for 34% of total energy supply in Sweden, 38% in Finland, and 37% in Denmark. Norway still relies primarily on hydropower, while Iceland depends mainly on geothermal energy (Table 17).

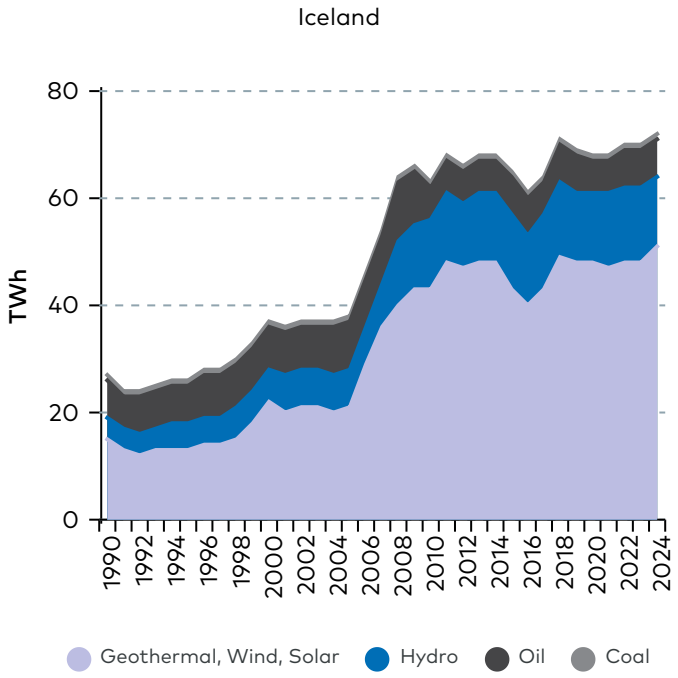
Table 17: Proportion of energy supply by source 1990 and 2024, percentage and change. Wind, solar and thermal is combined since it is not separated in the statistics for Iceland and Norway. Nuclear is counted with heat losses subtracted. Source: International Energy Agency.

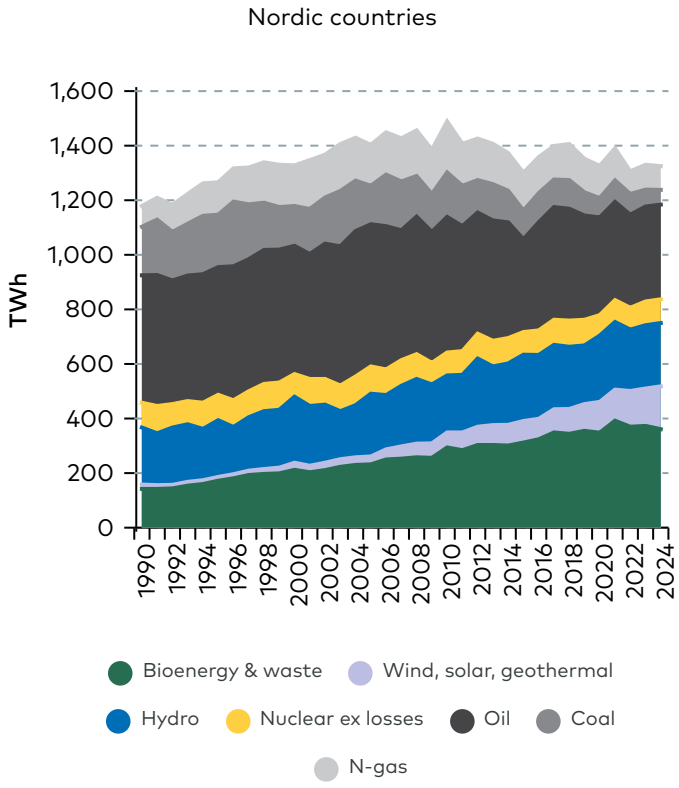
	Renewables				Fossiles		
	Bioenergy & waste	Wind, solar, geothermal	Hydro	Nuclear	Oil	Coal	N-gas
Sweden							
1990	15%	0%	17%	17%	40%	8%	2%
2024	34%	10%	15%	11%	25%	4%	2%
Change	+19%	+10%	-3%	-6%	-16%	-4%	0%
Finland							
1990	19%	0%	4%	7%	39%	22%	9%
2024	30%	7%	5%	11%	25%	7%	5%
Change	+20%	+7%	+1%	+4%	-14%	-15%	-4%
Norway							
1990	5%	0%	46%	0%	36%	4%	9%
2024	8%	5%	43%	0%	28%	3%	14%
Change	+3%	+5%	-4%	0%	-8%	-1%	+5%
Denmark							
1990	7%	0%	0%	0%	46%	36%	11%
2024	37%	14%	0%	0%	36%	3%	9%
Change	+30%	+14%	0%	0%	-9%	-33%	-2%
Iceland							
1990	0%	55%	16%	0%	27%	3%	0%
2024	0%	71%	19%	0%	9%	1%	0%
Change	0%	+16%	+3%	0%	-18%	-1%	0%
Nordic countries, all							
1990	12%	1%	18%	8%	40%	15%	6%
2024	27%	12%	18%	7%	26%	4%	7%
Change	+15%	+10%	0%	-1%	-13%	-11%	0%
EU							
1990	3%	0%	2%	13%	37%	27%	17%
2024	14%	7%	3%	16%	39%	10%	25%
Change	+11%	+7%	+1%	+2%	+2%	-17%	+8%

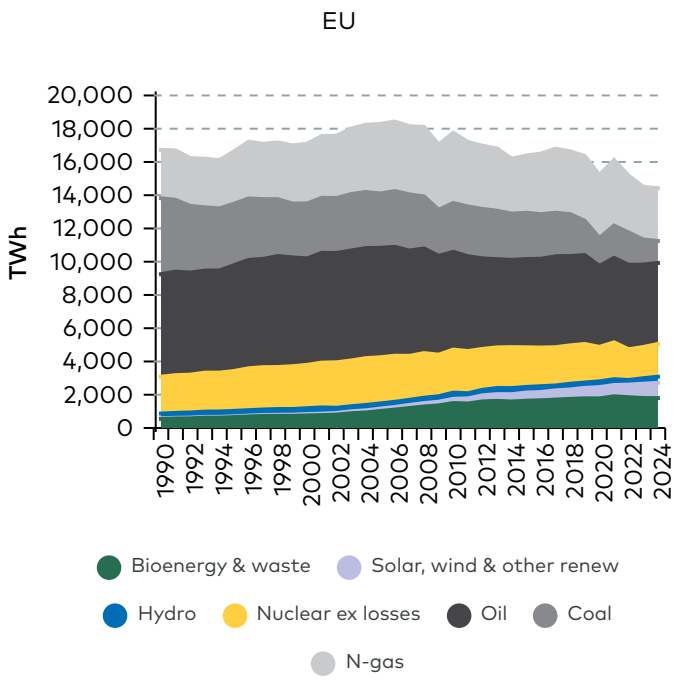
Figure 19 shows the share of each energy source in the total energy supply for the individual Nordic countries and for Europe. Nuclear power is shown excluding conversion heat losses (approximately 67% of total production). The figures indicate that the role of bioenergy has increased at the expense of oil and coal.

Figure 19: Total energy supply by source, TWh, 1990–2024. Source: International Energy Agency, Energy statistics data browser.









Forest residue accounts for the largest share of renewable energy in Sweden, Finland, and Denmark. Norway uses relatively little bioenergy for several reasons: heating is primarily electric, the expansion of district heating has been modest, and the Norwegian forest industry is less developed than those of Sweden and Finland.

In Denmark, Finland and Sweden, a substantial share of bioenergy is used for district heating and combined heat and power generation (CHP). In Denmark, condensing power production previously based on fossil fuels has also been converted to bioenergy, largely pellets.

The forest industries in Finland and Sweden have very high internal use of bioenergy, including both solid by-products such as bark and shavings from sawmills, and black liquor from pulp mills. In Sweden, about half of the forest-based bioenergy is used in the production of pulp and sawn wood. Production of advanced biofuels from forest raw materials is still in its infancy, apart from the production of biodiesel from tall oil in Sweden and Finland.

In 2024, the share of bioenergy in total energy supply was 34% in Sweden, 38% in Finland and 37% in Denmark. In Sweden, most of the total energy supply is derived from forests. Figure 20 shows how wood-based energy in Sweden is distributed across different end uses.

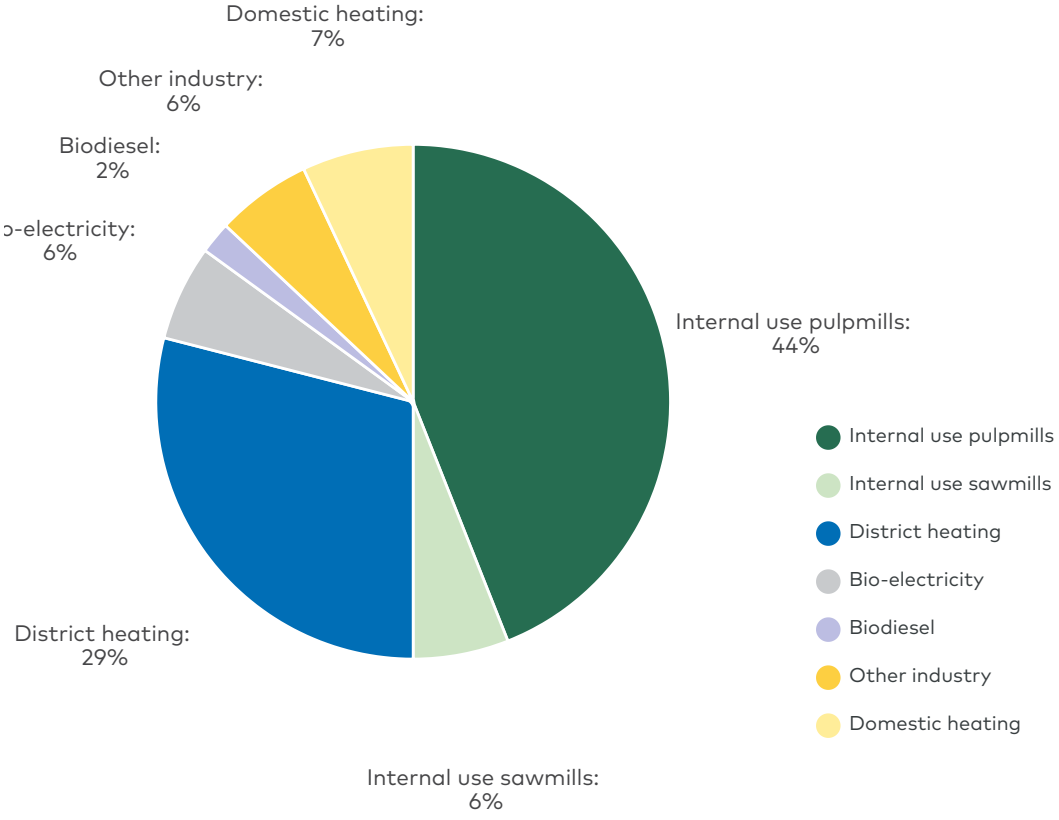


Figure 20: End-use of wood-based bioenergy in Sweden. Based on calculations from Svebio.

4. Forest industry production and trade

The Nordic region is a major global exporter of forest products, ranking as the world's largest exporter of both softwood sawn wood and paper, and second in wood pulp exports alongside Canada, though well behind Brazil.

Global forest product output has declined over the past five years, mainly due to weaker demand for sawn wood and panels in the housing sectors across Europe, the US, and China. In contrast, pulp and paper consumption has remained relatively strong, reaching near record levels in 2024, supported by growing demand for packaging.

In the Nordic region, softwood sawn wood production has remained relatively high over the past decade (Figure 21). However, output of wood pulp and wood-based panels has declined by around 15% from its peak six years ago. The sharpest contraction has occurred in paper and paperboard, with production down significantly since 2018 – most notably in Finland (-34%) and Sweden (-20%).

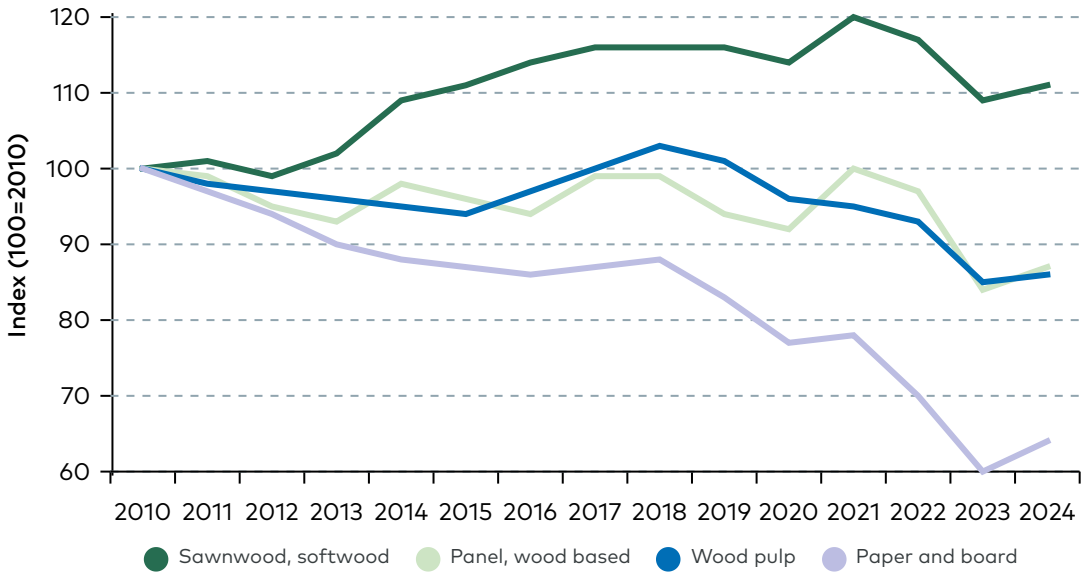


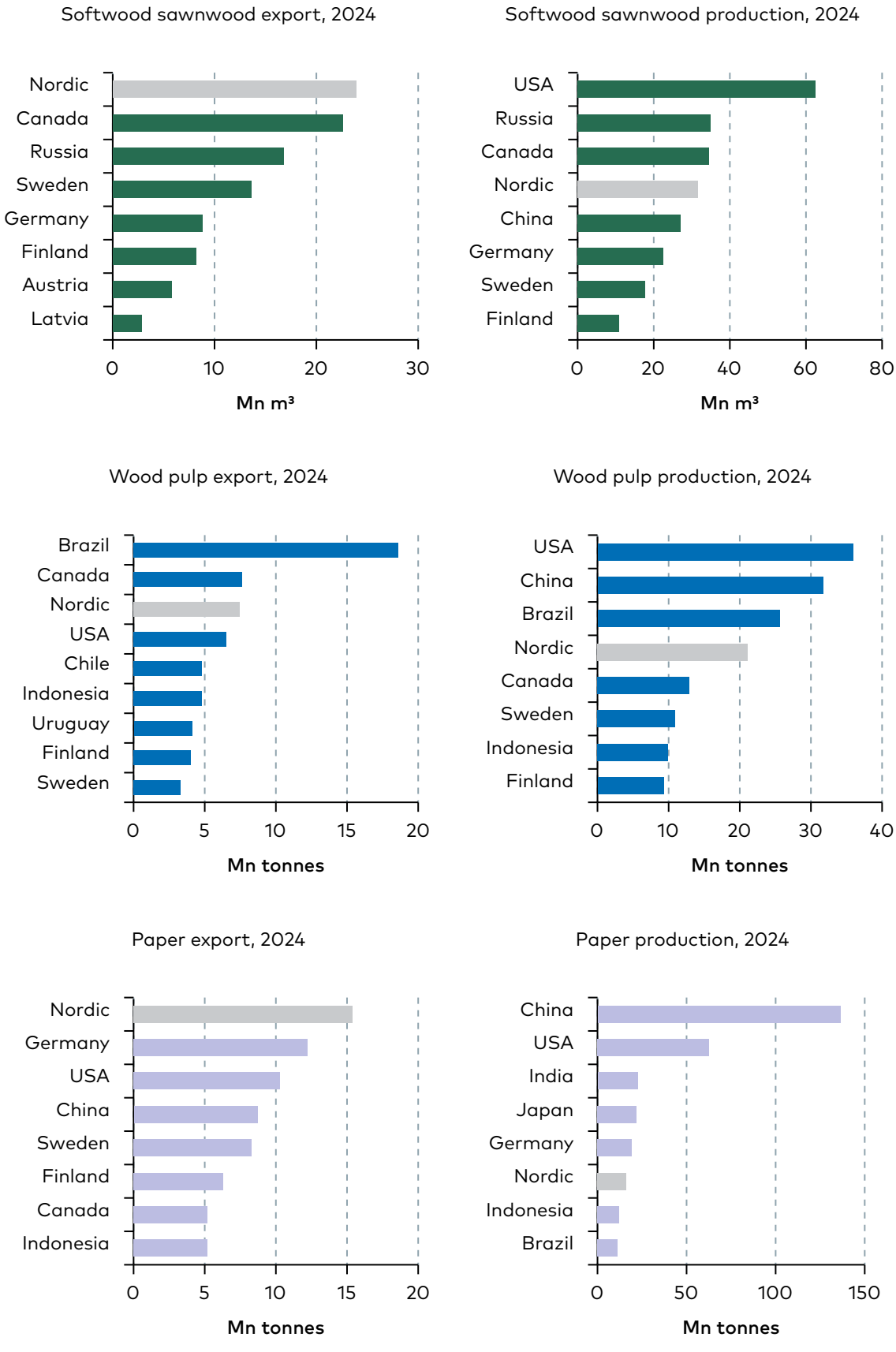
Figure 21: Trends in forest products production 2010–2024, total for the Nordic countries. Index 100=2010.

The Nordic forest industry remains highly export oriented. In 2024, the region accounted for 24% of globally traded softwood sawn wood – the highest share on record – along with 14% of paper and paperboard exports and 11% of global wood pulp trade (with a stronger position in softwood pulp).

Competitive advantages – including well-managed forests, efficient manufacturing, and relatively low wood raw-material costs compared with those in other European countries – have enabled Nordic sawn wood exports to grow faster than the global average over the past decade. By contrast, pulp and paper exports have declined.

The Nordic countries are major global producers and exporters of forest products. In 2024, the region was the world's largest exporter of softwood sawn wood and paper products and the third-largest exporter of pulp, behind Brazil and Canada (Figure 22). Sweden and Finland are among the world's leading exporters across all major forest product categories.

Figure 22: Top 7 (8) countries in forest industry production and export in 2024, and the total from the Nordic countries. Source: FAO statistics.



4.1 Softwood sawn wood production

The Nordic countries account for around 30% of Europe´s softwood sawn wood production.

Sawmills in Northern Europe are key suppliers to both European and overseas markets, including Asia, the USA, North Africa, and the Middle East. Over the past 25 years, the region has consistently accounted for around 30% of Europe's softwood sawn wood production and about 10% of global supply.

In 2024, production totalled 32 million m³, about 3% below the 10-year average. Sweden remained the largest producer, at nearly 18 million m³ (56% of the Nordic total), followed by Finland with 11 million m³ (34%), Norway with 3 million m³ (8%), and Denmark with around 250,000 m³ (less than 1%) (Figure 23). These shares have remained largely unchanged over the past decade. The Nordic share of Europe has increased (Figure 24).

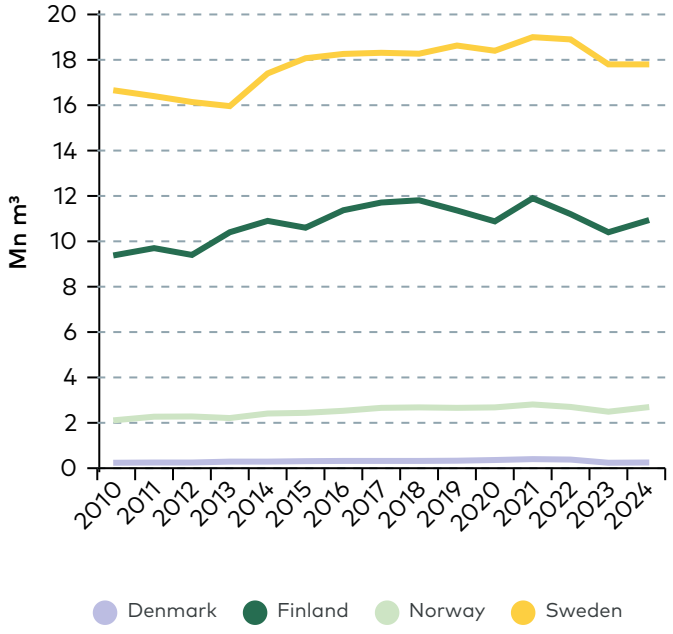


Figure 23: Softwood lumber production in the Nordic countries 2010–2024. Source: FAO.

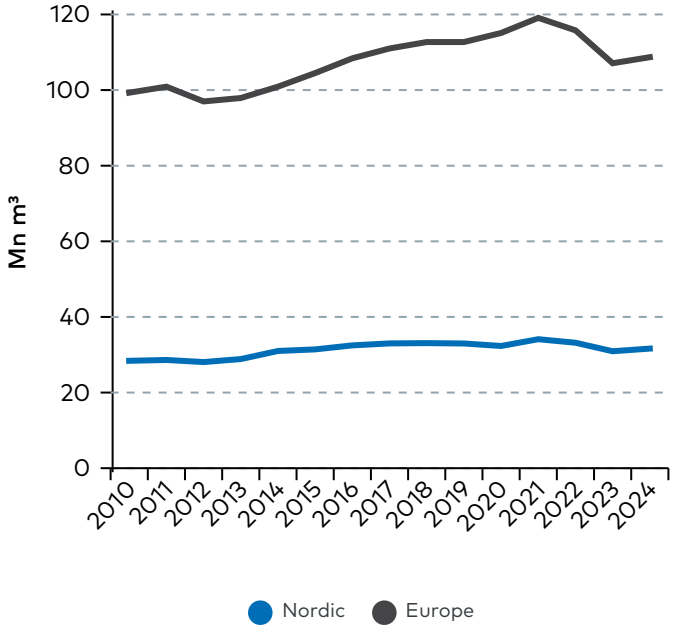


Figure 24: Total softwood sawn wood production in the Nordic countries and Europe, 2010–2024. Source: FAO.

Nordic share of Europe

2010 4.4%

2024 3.7%

4.2 Wood-based panel production

Production of wood-based panels (plywood, OSB, particleboard, and fiberboard) has declined across Europe over the past decade, with a steeper decline in the Nordic region. In 2024, Nordic production totaled 2.4 million m³, about 8% below the 10-year average (Figure 25).

The sector remains very small, accounting for less than 4% of total European panel production (Figure 26). Finland produces nearly half of Nordic volume, primarily plywood. The halt to Russian trade in 2022 significantly reduced birch log availability, leading to a sharp contraction in Finnish plywood production.

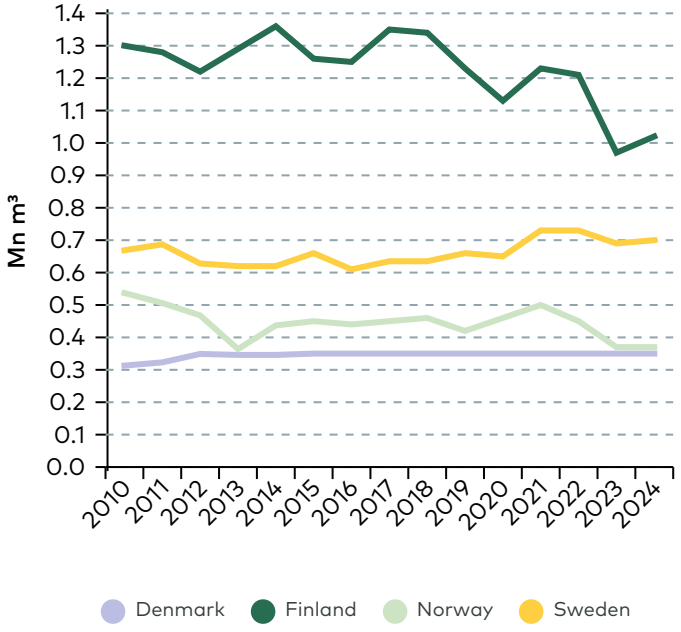


Figure 25: Wood-based panel production in the Nordic countries, 2010–2024. Source: FAO.

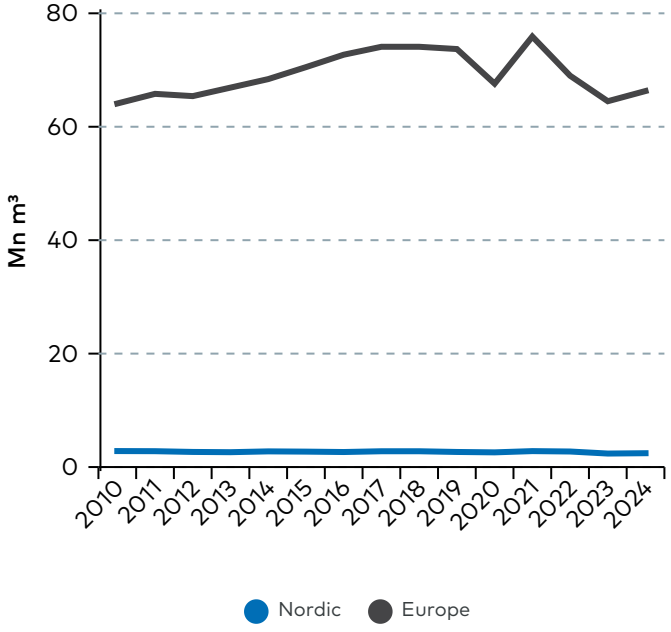


Figure 26: Total wood-based panel production in the Nordic countries and Europe, 2010–2024. Source: FAO.

Nordic share of Europe

2010 4.4%

2024 3.7%

4.3 Wood pulp production

Mechanical pulp production has declined, but the Nordic countries still account for over 60% of Europe´s pulp production.

Nordic pulp production has declined over the past six years, from a record high of 25.1 million tons in 2018 to 21.1 million tons in 2024 (Figure 27). Despite this reduction, Northern Europe still accounts for over 60% of total European pulp production – a share that has remained stable for more than two decades (Figure 28). The largest decline has been in mechanical pulp (high-yield pulp), whereas the reduction in chemical pulp (low-yield pulp) has been smaller since the peak.

In 2024, Sweden produced 10.9 million tons, about 6% below its 10-year average. Finland saw a larger decline, with output at 9.3 million tons (13% below its 10-year average). Norway's pulp sector has contracted significantly, largely due to falling demand for newsprint, with production falling from just over 2 million tons in 2010 to less than 900,000 tons in 2024.

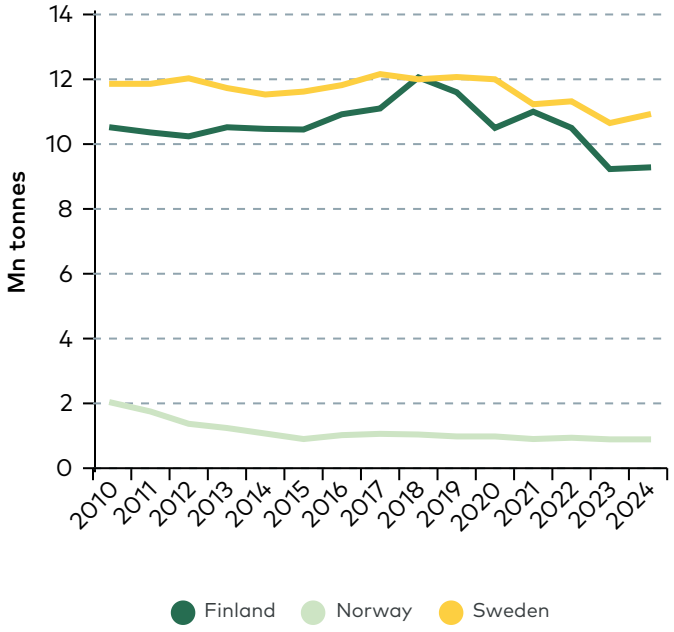


Figure 27: Wood pulp production in the Nordic countries, 2010–2024.
Source: FAO.

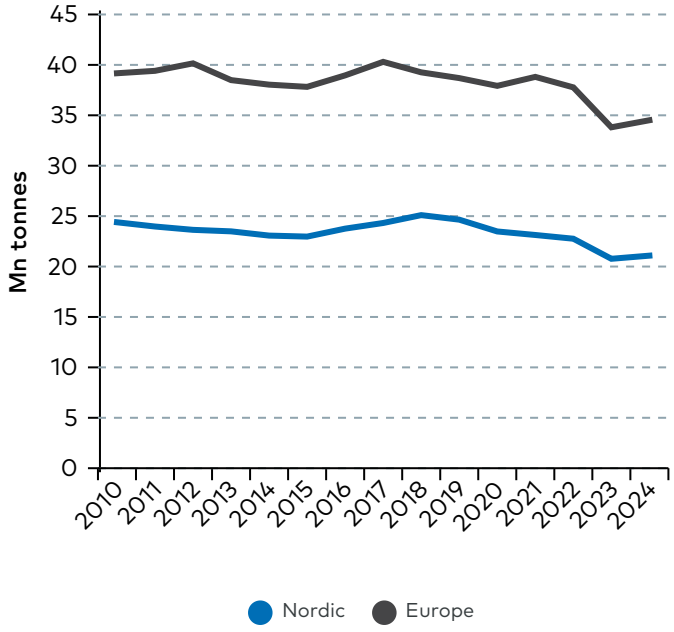


Figure 28: Total wood pulp production in the Nordic countries and Europe, 2010–2024. Source: FAO.

Nordic share of Europe
2010 62.3%
2024 61.1%

4.4 Paper production

Paper and paperboard production has declined steadily over the past 15 years.

Paper and paperboard production in the Nordics has declined steadily over the past 15 years, from 25 million tons in 2010 to 15 million tons in 2023 (Figure 29). The decline has been concentrated in newsprint and office paper, whereas production of packaging and hygiene grades has increased.

In 2024, production in Sweden and Finland rose by about 7% year on year, driven entirely by higher output of softwood-based paperboard. Although production has also declined elsewhere in Europe, the contraction has been more pronounced in the Nordic region (Figure 30). As a result, the Nordic share of European paper production has fallen from about 24% to 19% over the past 15 years. Globally, the region's share has declined from 6.3% in 2010 to 3.8% in 2024.

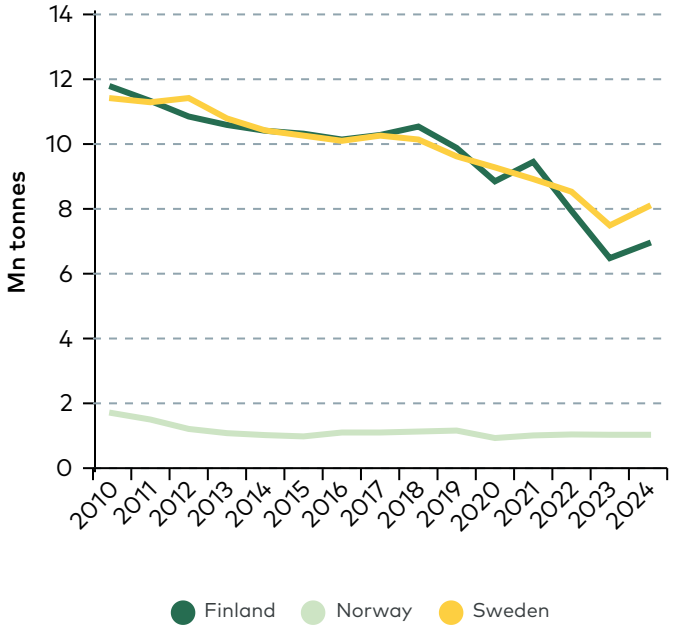


Figure 29: Paper production in the Nordic countries, 2010–2024.
Source: FAO.

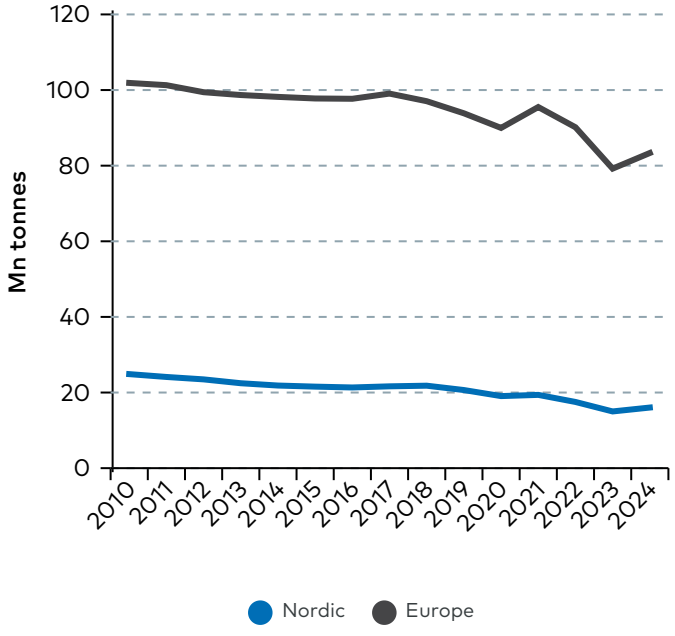


Figure 30: Total paper production in the Nordic countries and Europe, 2010–2024. Source: FAO.

Nordic share of Europe
2010 24.4%
2024 19.2%

4.5 Timber trade

Most of the timber log trade is intra-regional within the Nordic region.

Countries around the Baltic Sea region serve as the primary source of wood for sawmills and pulp mills in Finland and Sweden. Nordic companies also import smaller volumes of logs from the Baltic States, Poland, and Germany on an opportunistic basis when domestic supply is tight or imported wood is cost competitive. It is important to note that about 70% of the Nordic softwood log trade is intra-regional trade between Finland, Norway, and Sweden.

Historically, the most significant intra-regional trade flows have been from Russia to Finland and from Norway to Sweden. However, following Russia's invasion of Ukraine in 2022, Finland – along with most European countries – halted imports of Russian goods, including forest products. As a result, log trade between Russia and Finland declined sharply and effectively ceased by the second half of 2022.

By 2025, log trade flows had shifted primarily within the Baltic Sea region (Figure 31). The largest import flows into the Nordic countries included:

- Softwood logs from Norway to Sweden (3.5 million m³). 48% sawlogs
- Softwood logs from Latvia to Sweden (1.4 million m³). 28% sawlogs
- Softwood logs from Finland to Sweden (0.8 million m³). 91% sawlogs.
- Hardwood logs from Latvia to Sweden (0.9 million m³). 0% sawlogs

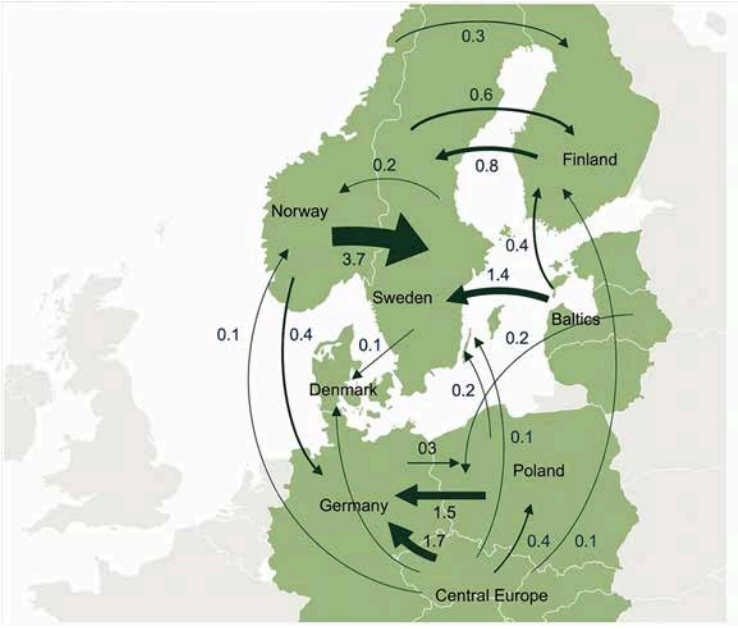


Figure 31: Softwood log trade in Northern Europe, 2025, million m^3. Source: GWT.

Finnish pulp and sawmills have historically relied on imported wood raw material to meet fiber demand. In 2021, approximately 24% of the pulp sector's raw material came from imported logs and wood chips, predominantly from Russia. Following the collapse of Russian imports in 2022, Finland significantly reduced its reliance on foreign fiber. By 2024, import dependence had fallen to around 10%, despite only a modest decline in total wood fiber consumption.

Sweden is the largest log-importing country in Northern Europe. In 2025, it imported approximately 8.1 million m³ of logs, of which about 82% was softwood. Imports came almost entirely from neighboring countries around the Baltic Sea, with Norway accounting for 61%, followed by Latvia (13%), Finland (13%), and Estonia (7%).

Norway is currently Europe's largest exporter of softwood logs and ranks second globally after New Zealand. In 2025, Norway exported 5.2 million m³ of softwood logs – a record high and a 10% year-on-year increase. This represented around 38% of the country's total harvest, a higher share than in any other European country.

Figures 32–37 show the export and import statistics of logs for the period 2010–2025.

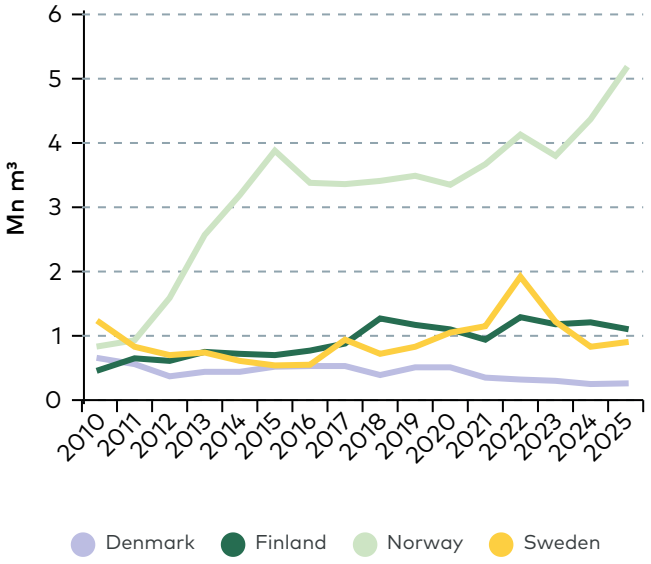


Figure 32: Softwood log exports in the Nordic countries, 2010–2025. Source: FAO, GTT.

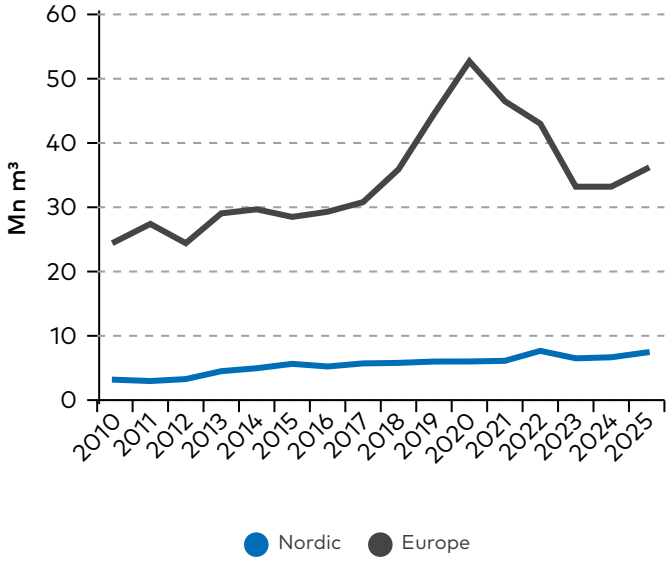


Figure 33: Total softwood log exports in the Nordic countries and Europe, 2010–2025. Source: FAO, GTT and GWT.

Nordic share of Europe

2010 12.9%

2024 20.6%

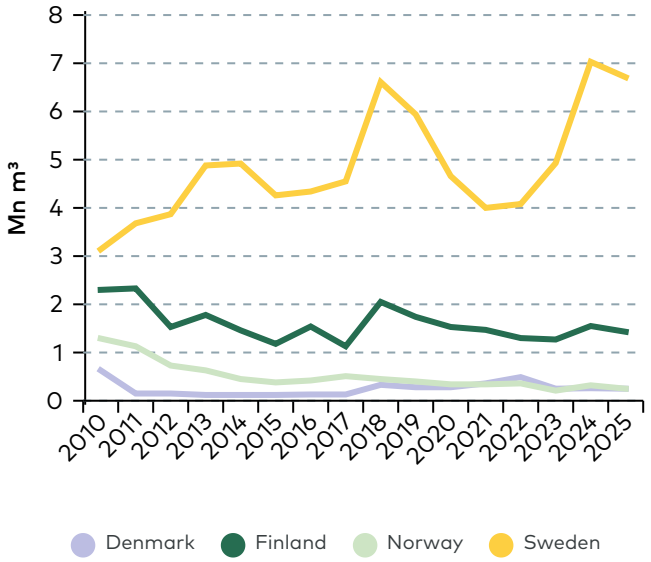


Figure 34: Softwood log imports in the Nordic countries, 2010–2025. Source: FAO, GTT.

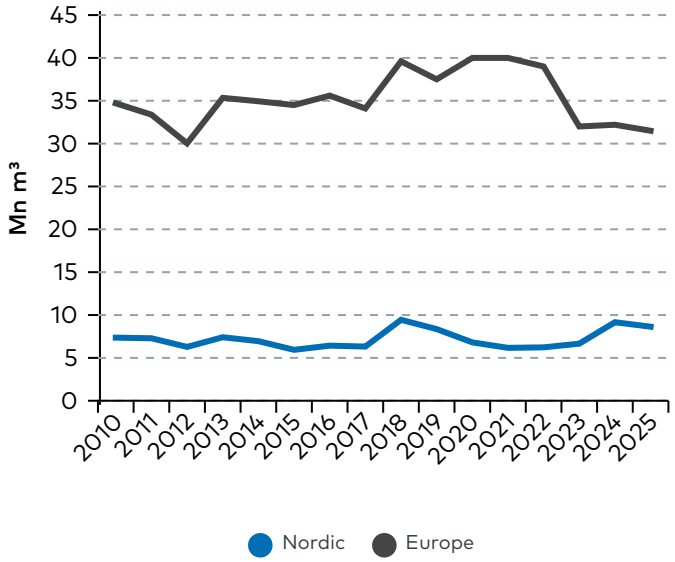


Figure 35: Total softwood log imports in the Nordic countries and Europe, 2010–2025. Source: FAO, GTT, GWT.

Nordic share of Europe

2010 21.2%
2024 27.4%

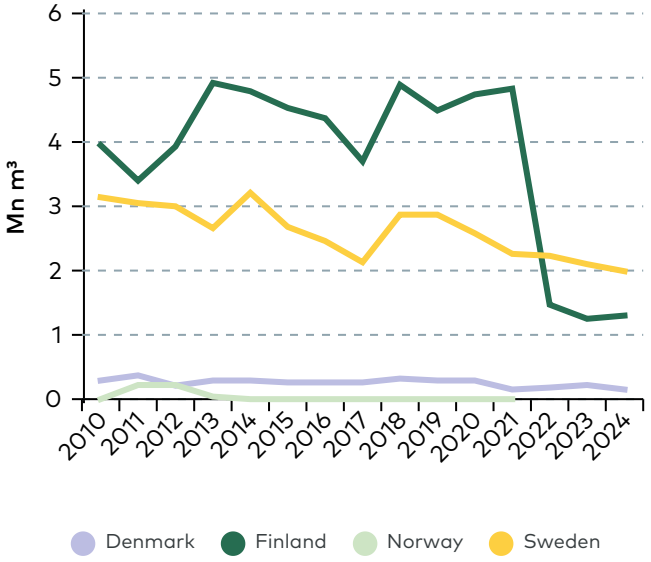


Figure 36: Hardwood log imports in the Nordic countries, 2010–2024. Source: FAO.

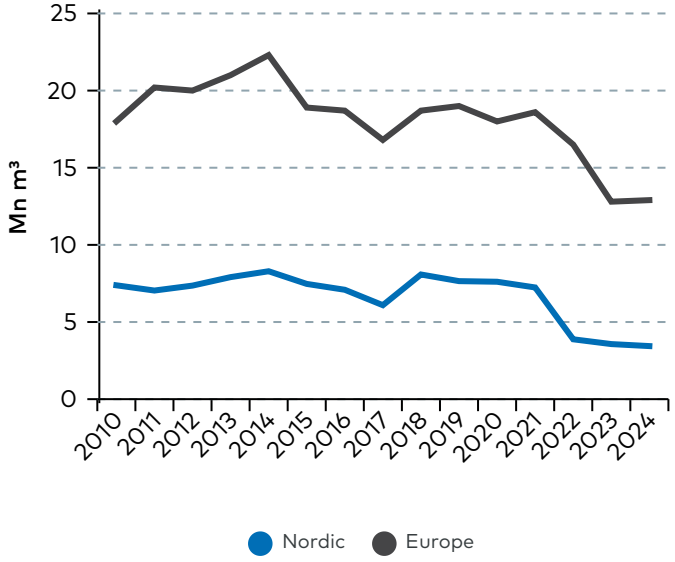


Figure 37: Total hardwood log imports in the Nordic countries and Europe, 2010–2024. Source: FAO.

Nordic share of Europe

2010 41.0%
2024 26.7%

4.6 Softwood sawn wood exports

The Nordic region is the world's largest exporter of softwood sawn wood.

Europe accounts for about 27% of global softwood sawn wood demand and just over 33% of supply, with production and exports concentrated in the Nordic region (primarily Sweden and Finland) and parts of Central Europe. After several years of steady growth, European wood demand declined in 2022–2024 due to weaker construction activity.

In recent years, production has exceeded demand, with nearly 20% of output exported. In Central Europe, bark beetle damage is subsiding but will have lasting structural effects, including a shift away from softwood and reduced log availability. As a result, future growth in European sawn wood production is expected to be driven primarily by the Nordic region and other less-affected areas. Exports are likely to remain broadly stable, as stronger regional demand offsets changes in global trade flows.

Sawn wood exports from the Nordic countries reached a record 24 million m^3 in 2025, with Swedish and Finnish sawmills shipping 14 million m^3 and 9 million m^3, respectively (Figure 38). This expansion coincided with declines in exports from other major producing countries, including Canada, Russia, and Germany. Consequently, the Nordic share of European exports rose sharply to 63% in 2025 (up from 43% in 2021), while their share of global exports increased to 24% (from 17%) (Figure 39).

Sweden remains Europe's largest exporter of softwood sawn wood. Exports peaked at 14.0 million m^3 in 2023 and declined slightly to 13.7 million m^3 in 2025, reflecting weaker European demand. Market developments have been mixed: exports to the United States and the MENA region (Middle East and North Africa) have grown strongly since 2021, while shipments to China and other parts of Asia have declined. Demand within Europe has remained broadly stable.

Finland ranks as Europe's second-largest exporter and was the only Nordic country to post significant export growth in 2025. Shipments rose 11% year on year to 9.0 million m^3, surpassing the 10-year average. The increase was driven primarily by stronger demand across European markets, including the United Kingdom, the Netherlands, Germany, and Estonia.

Norwegian sawn wood exports are small, both because production is low and because a large share of it (around 70%) is consumed domestically.

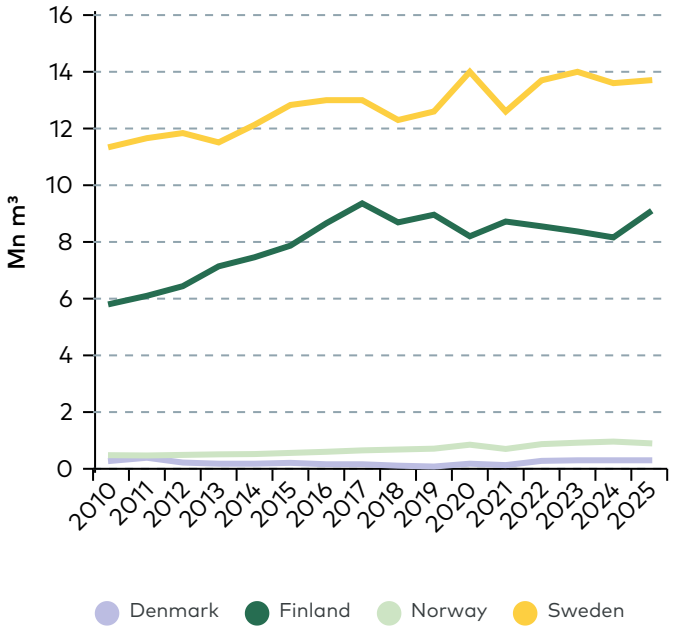


Figure 38: Softwood lumber exports in the Nordic countries, 2010–2025. Source: FAO, GTT.

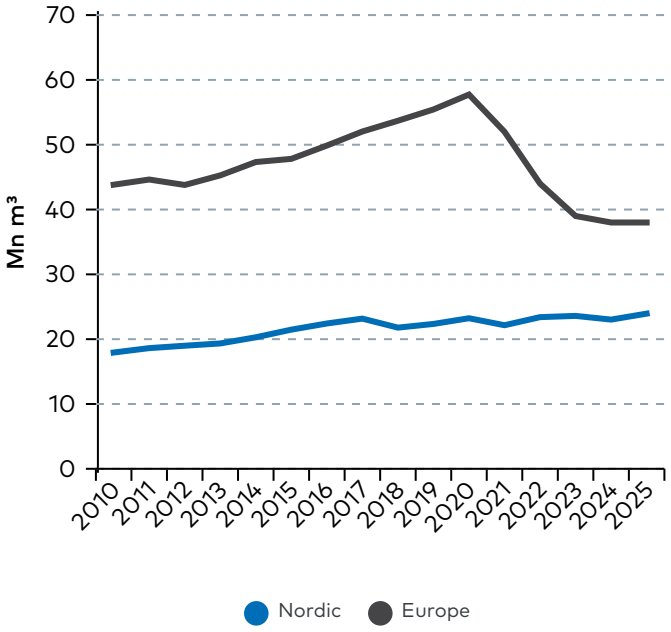


Figure 39: Total softwood lumber exports in the Nordic countries and Europe, 2010–2025. Source: FAO, GTT, GWT.

Nordic share of Europe

2010 40.9%

2024 63%

4.7 Wood pulp export

Pulp exports have fallen, but the Nordic region remains the third-largest wood pulp exporting region in the world.

The Nordic region is the third-largest wood pulp exporter in the world, behind Brazil (18.6 million tons) and closely behind Canada (7.6 million tons). However, total pulp exports from Finland, Norway, and Sweden fell to a seven-year low of 7.4 million tons in 2024 (Figure 40). Since the all-time high in 2019, shipments have declined most in Norway (-37%), followed by Sweden (-23%) and Finland (-12%). In addition to lower export volumes, the Nordic pulp industry's share of total European exports has declined from 56% in 2019 to 50% in 2024 (Figure 41). Despite reduced production in both Finland and Sweden, the two countries remain the largest pulp exporters in Europe.

On the global stage, Nordic pulp producers remain significant players, although their share of world trade has declined from around 13% over the past decade to just over 11% in 2024. This loss of market share is largely attributable to major capacity expansions using Eucalyptus wood fiber in Latin America (Brazil, Uruguay, and Chile) and Asia (Indonesia and China).

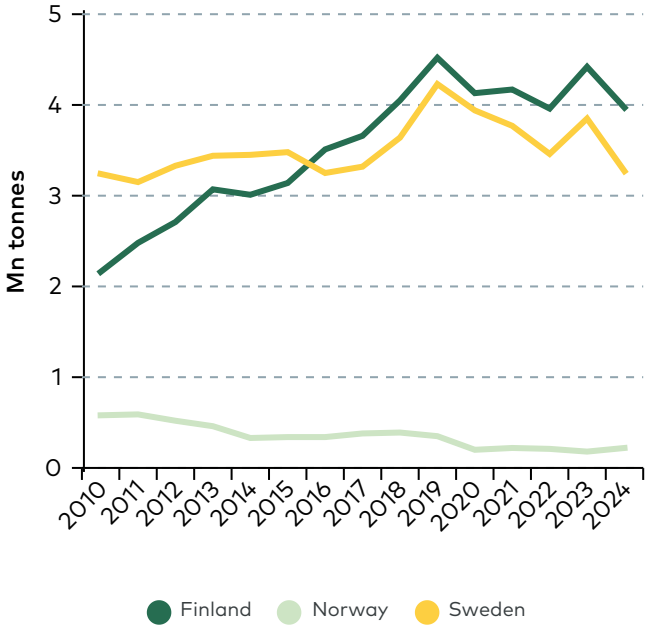


Figure 40: Wood pulp exports in the Nordic countries, 2010–2024.
Source: FAO.

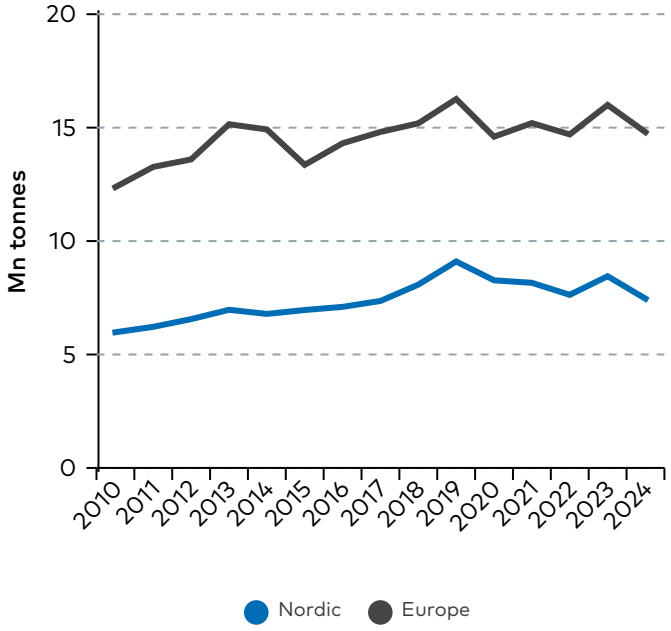


Figure 41: Total wood pulp exports in the Nordic countries and Europe, 2010-2024. Source: FAO.

Nordic share of Europe

2010 48.3%
2024 50.4%

4.8 Paper export

The Nordic region is the world's largest exporter of paper and paperboard.

Paper producers in the Nordic countries have long been major suppliers to the European market and are the world's largest exporters of paper and paperboard. However, their share of European shipments has declined, mirroring the trend seen in pulp. Fifteen years ago, the Nordics accounted for roughly one-third of European paper exports; by 2024, this had fallen to 28%, with total shipments of 15.4 million tons from Sweden (8.3 million tons), Finland (6.3 million tons), and Norway (0.8 million tons) (Figures 42-43). Notably, total shipments increased by 7% year-on-year in 2024 – the strongest growth in more than two decades.

Since the 2018 peak, Finland has recorded the largest decline in paper exports, falling from 10 million tons to 6.3 million tons in 2024 (a 37% decrease). Sweden's decline has been more moderate, at 13% over the same period.

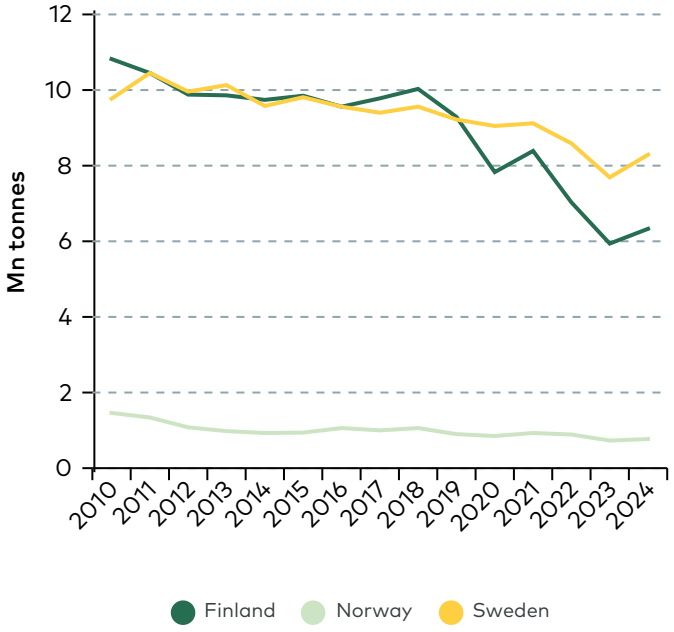


Figure 42: Paper exports in the Nordic countries, 2010-2024. Source: FAO.

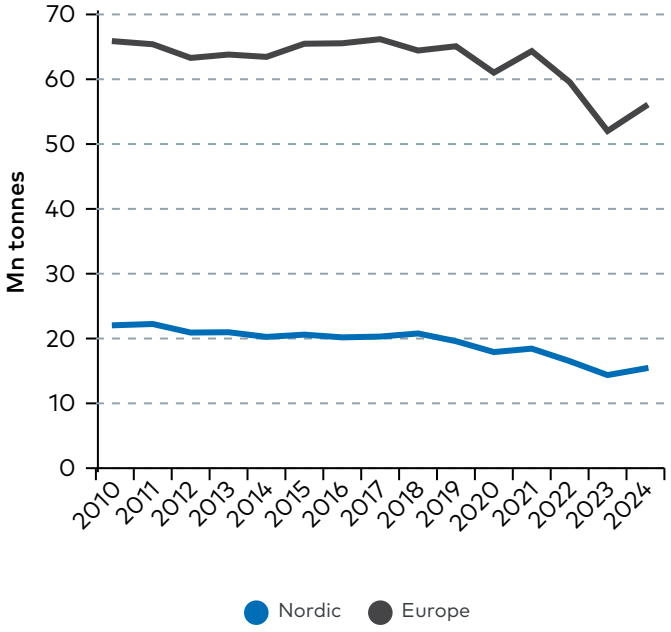


Figure 43: Total paper exports in the Nordic countries and Europe, 2010-2024. Source: FAO.

Nordic share of Europe

2010 33,5%

2024 27,6%

5. Wood raw-material prices

The cost of wood raw material is a key determinant of the competitiveness of both pulp mills and sawmills. Depending on product grade and market conditions, these costs typically account for 45–75% of total production costs. In this section, prices for sawlogs and pulp logs delivered to manufacturing plants are presented for the major producing countries over the past decade.

Other manufacturing costs – such as energy, labour, chemicals, and overhead – account for a smaller share of total variable costs and generally fluctuate less than wood raw material costs.

When comparing price developments in forest products, exchange-rate movements should be considered. Relative to most other export industries, the forest sector has an unusually large share of input costs – such as raw materials, labour, and energy– denominated in domestic currency. Between 2010 and 2025, the Swedish and Norwegian krona weakened by an average of 26% against the Euro.

5.1 Softwood sawlog prices

The European sawlog market has been highly volatile over the past seven years, marked by declining wood demand, shifting log flows, and substantial price swings. The European Softwood Sawlog Price Index (ESPIX) fell to an 11-year low of below €72/m³ in 2020, then rose to nearly €120/m³ in 2025. This leaves the index approximately €25/m³, or 28%, above its 15-year average.

Softwood sawlog prices in the Nordic countries have broadly followed the European trend, although increases have been more pronounced in some markets. In 2025, average prices reached €103/m³ in Sweden and €100/m³ in Norway – both close to 50% above their 15-year averages – while Finland saw more moderate increases.

In Sweden, spruce sawlog prices rose by 28% between 2023 and 2025, primarily due to reduced supply from private forest owners, particularly in the southern regions, rather than increased demand. As in much of Europe, Sweden has seen weaker lumber demand due to a slowdown in construction activity. However, export markets have remained relatively strong, supported by competitive euro pricing, given the weak Swedish krona. Despite rising lumber prices, increases in wood raw material costs have been even more pronounced, resulting in lower sawmill margins in 2025 compared with the previous two years.

In Finland, where sawlog prices have historically been the highest in the Nordic region, recent increases have been more modest (Figure 44). In 2025, prices averaged €113/m³, just 4% higher than in 2023.

Norway and Sweden have recorded the largest price increases in Europe since 2023. Despite these increases, sawlog costs in both countries remain below those in competing markets such as Finland, Estonia, Germany, and Austria.

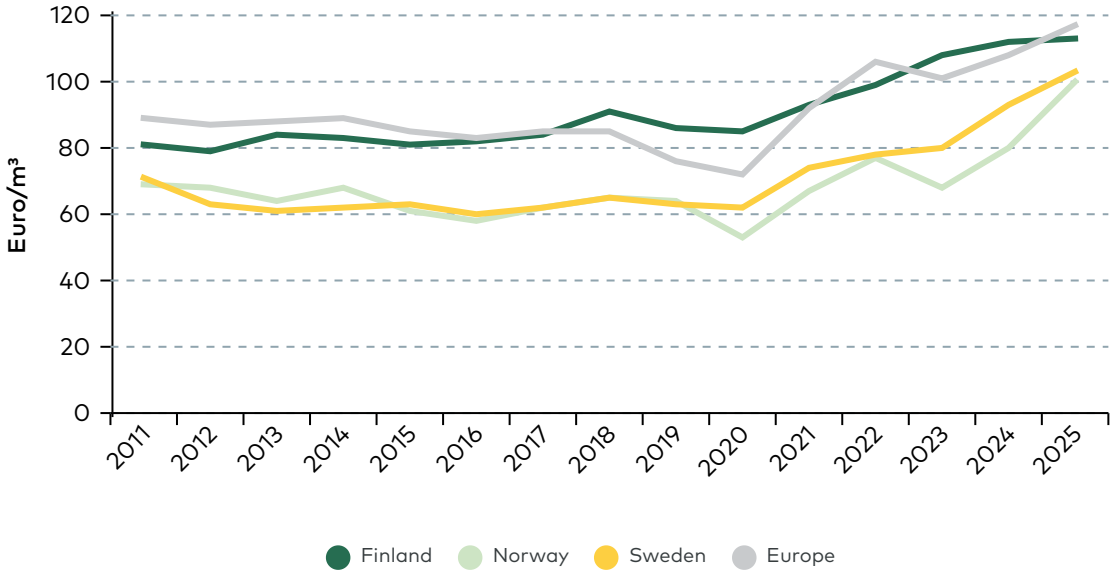


Figure 44: Softwood spruce sawlog prices, €/m^3, in the Nordic countries and Europe. Source: Global Wood Trends.

5.2 Pulpwood prices

Global pulp markets were strong in 2024 and 2025, with prices close to or at record levels in both Europe and North America. A tight wood fiber supply – driven by reduced timber harvests, lower availability of sawmill residues, and the loss of Russian imports – has pushed up costs for pulp logs and wood chips.

Hardwood fiber markets saw the most pronounced increases, particularly after the halt to European imports of Russian hardwood logs in 2022. The World Hardwood Fiber Price Index (HFPIX) rose by more than 50% between 2021 and 2023, reaching one of its highest levels in over 35 years. Prices eased somewhat in 2024–25 in parts of North America and Central Europe, while weakening currencies reduced costs in Latin America in euro terms.

The World Softwood Fiber Price Index (SFPIX) has continued to trend upward since 2021, largely driven by developments in the Nordic region. By contrast, prices in Central Europe and North America have remained more stable.

In the Nordic countries, softwood pulp log prices have risen by 40–75% (in euro terms) over the past five years, reaching record levels in 2024–25. Price increases have been most pronounced in Norway (+73%), followed by Sweden (+62%) and Finland (+38%) (Figures 45-46). Key drivers include strong pulp prices, reduced harvest levels, lower availability of wood chips, tight log supply, and increased competition for small-diameter timber.

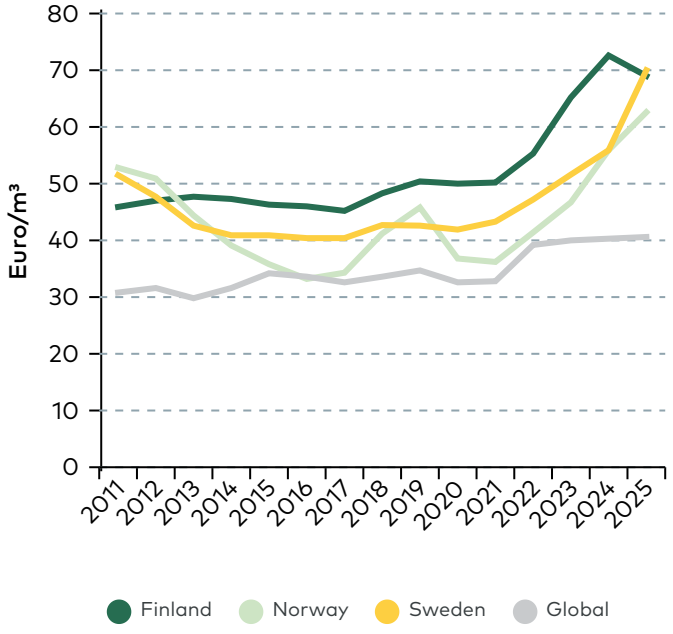


Figure 45: Softwood pulpwood prices, €/m^3, in the Nordic countries and globally. Source: Global Wood Trends.

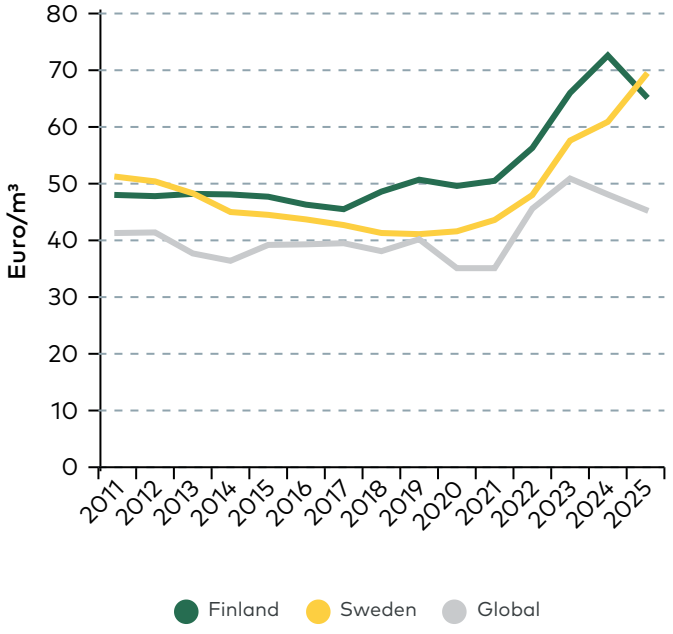


Figure 46: Hardwood pulpwood prices, €/m^3, in Finland, Sweden and globally. Source: Global Wood Trends.

6. Biodiversity and conservation

6.1 Protected forests

50% of Europe's strictly protected forest areas are in the Nordic countries

The term *protection* encompasses a wide range of forest management categories. At the strictest end of the spectrum are forests where no intervention is permitted, and public access is restricted. At the other end, protection may involve some limitations on forestry and agriculture, while timber harvesting is still allowed.

European countries use different national definitions of protected forests and report different areas to Forest Europe and other international organisations. This makes direct statistical comparisons difficult. As guidance, Forest Europe groups protected forests into three broad classes (Table 18): Class 1, where biodiversity is the primary objective; Class 2, where landscape values are prioritised; and Class 3, where the main purpose is protective functions such as soil stability, water quality, or protection against natural hazards.

Table 18: Class and categories of protection reported to Forest Europe.

Class 1: Main objective "Biodiversity"
1.1. No intervention (no direct human intervention, limited public access) 1.2. Minimum intervention (human intervention is limited) 1.3. Conservation through active management (active interventions to achieve specific conservation goals)
Class 2: Main objective "Landscape"
Protection of landscapes and specific natural elements (restricted use of forest resources, management goals to preserve landscape diversity, cultural, aesthetic, spiritual and historical values, recreation, or specific natural elements.
Class 3: Main objective "Protective functions"
Protective functions (management to protect soil or water quality, ecosystem functions, infrastructure, and manage natural resources against natural hazards)

The total area of protected forest in Europe in categories 1 and 2 amounted to 47 million hectares in 2025 (Table 19), of which the Nordic countries accounted for 7 million hectares. Sweden, Finland, and Norway report most of their protected forest in the stricter categories, where intervention is limited (1.1 and 1.2).

If only the strictest categories (1.1 and 1.2) are included, the total area of protected forest in Europe was 11.3 million hectares, of which the Nordic countries accounted for 5.6 million hectares. This means that half of all strictly protected forest in Europe is in the Nordic region.

The share of forest land under some form of protection (categories 1–3) ranges from 7.8% in Norway to 31.4% in Iceland. In Iceland, almost all reported protected forest falls under category 3.

Table 19: Area of protected forest in the Nordic countries 2025 per category according to Forest Europe. 1000 hectares.
Source: SoEF 2025.

	Sweden	Finland	Norway	Denmark	Iceland	Nordic	Europe	EU27
1.1 No intervention	388	0	0	0.1	0	388	1,613	1,566
1.2 Minimum intervention	1,783	2,669	705	69	0	5,226	9,646	8,324
1.3. Conservation, active management	227	0	0	38	1.6	266	19,038	17,937
2. Protection of landscapes	193	637	242	87	0	1,159	17,016	15,943
3. Protective functions	0	0	0	0	18	18	30,249	28,993
Total	2,591	3,306	947	194	19	7,057	77,562	72,763

Figures 47 and 48 show the strictly protected forests (category 1.1-1.2) in each European country. Liechtenstein and Albania have the highest proportion of forest area. Ranked by area, Sweden and Finland are at the top in Europe. These two countries account for 43% of the strictly protected area in Europe, and the Nordic countries together for 50%.

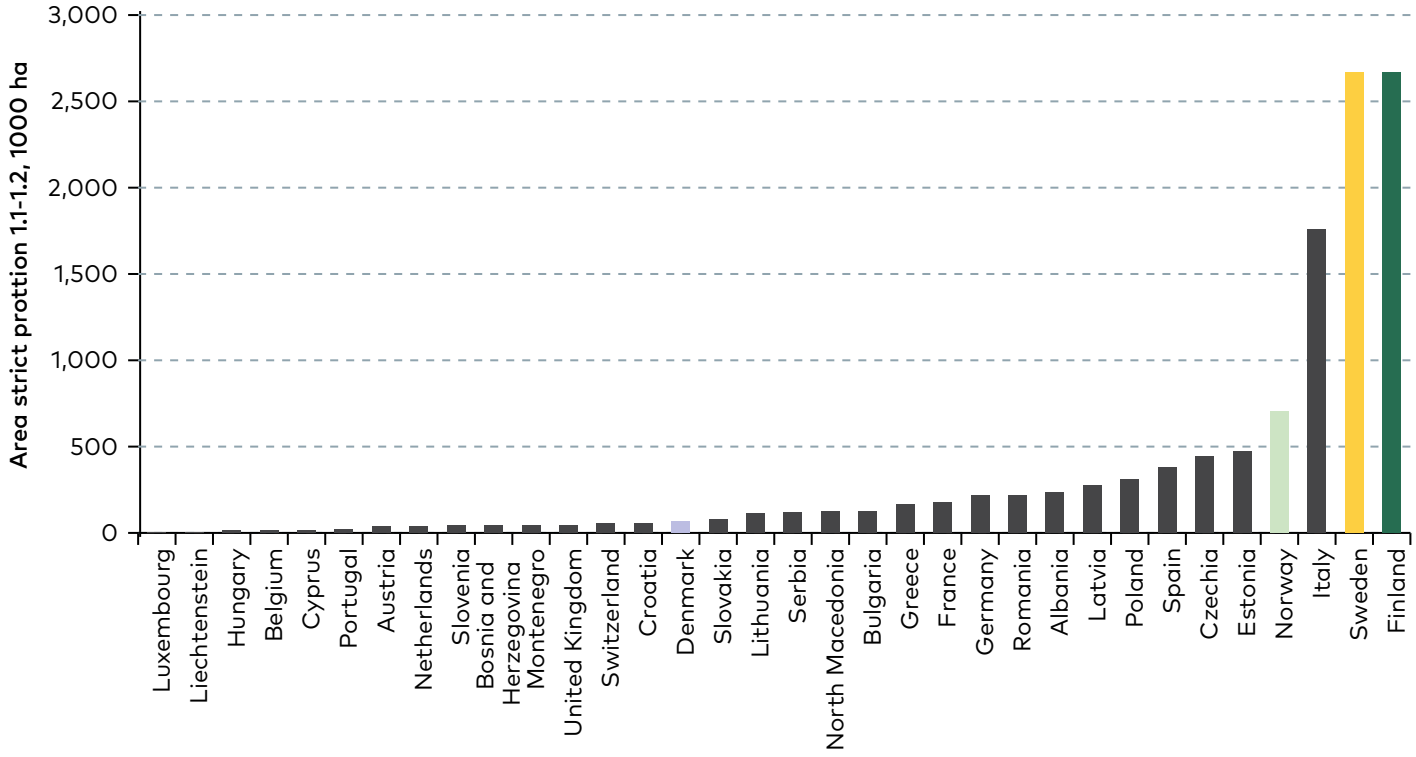


Figure 47: Area of the forest in the strict protected categories 1.1–1.2 in Europe. Source: SoEF 2025 and FRA 2025. Half of the area is found in Sweden and Finland.

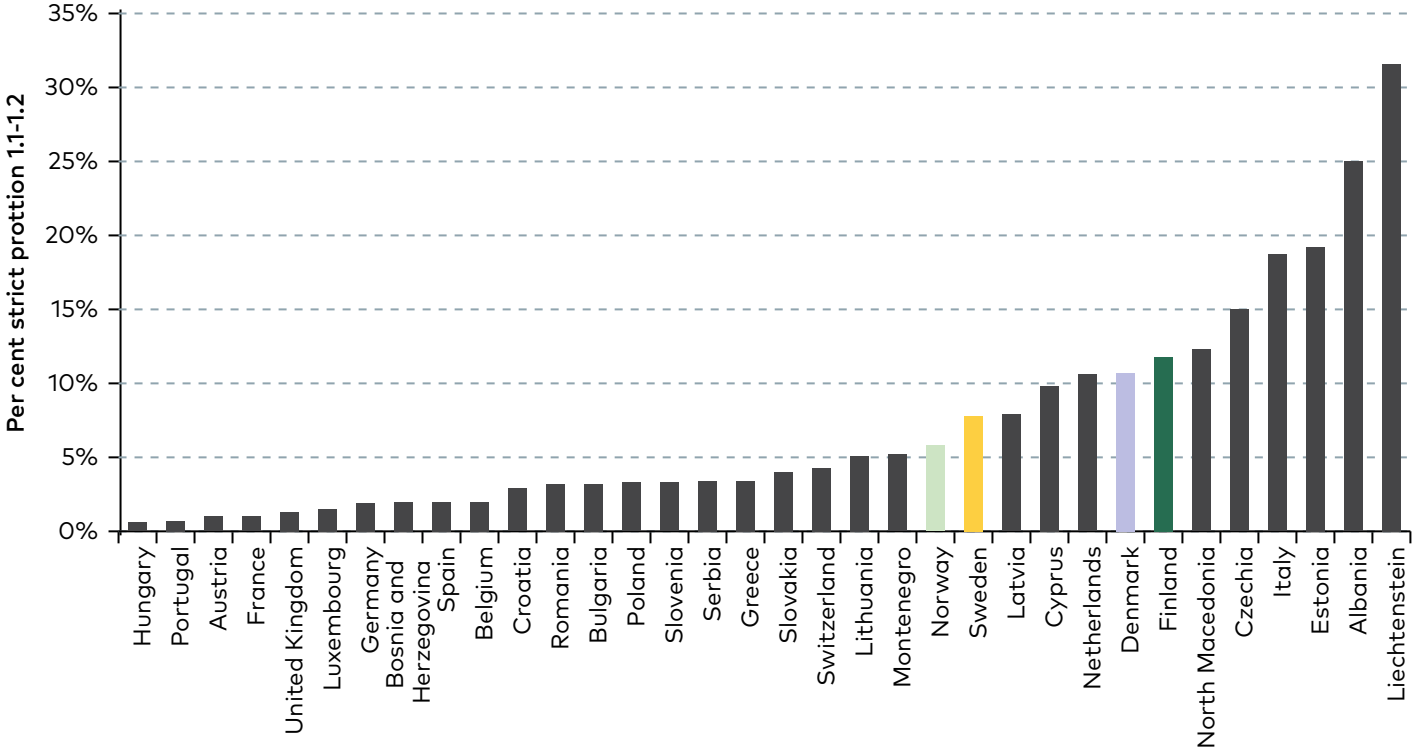


Figure 48: Percentage of the forest in the strict protected categories 1.1–1.2 in Europe. Source: SoEF 2025 and FRA 2025.

Forest exempt from logging

The reported Nordic figures mainly cover formally protected areas such as national parks and nature reserves. In addition, substantial areas are voluntarily set aside for conservation, and retention areas are permanently left unharvested after final felling. In Sweden and Norway, forestry is also prohibited on low-productivity forest land. When these categories are included, the share of forest land excluded from forestry is considerably higher than the share of formally protected land alone. In Sweden, forestry is excluded from around 27% of forest land (Table 20), and in Norway from 32% (SCB 2025; Nibio). 10 In addition, Norway has about 6,000 hectares of voluntary protection under the programme "frivillig vern" (Regjeringen.no 2025).

Table 20: An example from Sweden: Formally protected forest, voluntary set-asides, retention areas and low-production forest are all exempt from forestry. The table shows the areas and proportions in 2024. Source: SCB (Statistics Sweden).

	Area hectares without overlapping		% of area	
	Productive forest land	**All forest land**	**Productive forest land**	**All forest land**
Formally protected forest land	1,444,500	2,524,900	6.3%	9.4%
Voluntary set-asides	1,391,700	1,391,700	5.9%	5.0%
Retention	545,200	545,200	2.3%	1.9%
Unproductive forest land	0	3,017,400	0.0%	10.8%

6.2 Certified forests

Forest certification is a voluntary process in which an independent third party assesses forest management and production systems against a defined set of standards.

Two principal forms of certification are used:

1. Forest management certification, which assesses whether forests are managed sustainably and responsibly.
2. Chain of custody certification, which verifies that certified material is identified and kept separate from non-certified or uncontrolled material throughout the supply chain, from forest to final consumer.

The two dominant certification systems in Europe are the Forest Stewardship Council (FSC) and the Programme for the Endorsement of Forest Certification (PEFC).

Globally, certified forest area in 2025 totalled 296 million hectares under PEFC and 173 million hectares under FSC. Russia withdrew from FSC in 2022, reducing the global certified area by approximately 62 million hectares.

In Sweden, many forest areas are certified under both systems (double certification). FSC holds a particularly strong position in Sweden alongside PEFC, whereas PEFC is the leading scheme in Finland, Norway, and Denmark (Table 21). Iceland is in the process of establishing FSC certification, but no official figures are yet available.

Table 21: Certified Forest area according to FSC and PEFC in 2025, and its share of total forest area (fsc.org and pefc.org).

	FSC 1000 ha	FSC % of forest area	PEFC 1000 ha	PEFC % of forest area
Sweden	19,957	71%	16,434	59%
Finland	2,604	12%	16,292	75%
Norway	720	6%	12,108	60%
Denmark	233	36%	360	56%
EU-27	43,536	27%	71,307	44%

6.3 Biodiversity indicators

Several Nordic countries use national biodiversity indicators to monitor the environmental status of their forests.

In Sweden, one of the national environmental quality objectives is Sustainable Forests (sverigesmiljomal.se), with supporting indicators such as:

- protected forest area
- old forest
- breeding forest birds
- environmental consideration in forestry
- forest structures such as dead wood, old broadleaved stands, and large trees

Norway has developed the Nature Index (Naturindeks.no), which monitors ecosystem conditions across the country (Figure 49). The index is intended to show how closely current ecosystems resemble their natural state, with a value of 1 representing an undisturbed ecosystem. The forest index is based on 73 indicators.

These systems demonstrate the growing importance of measurable biodiversity outcomes in contemporary forest policy.

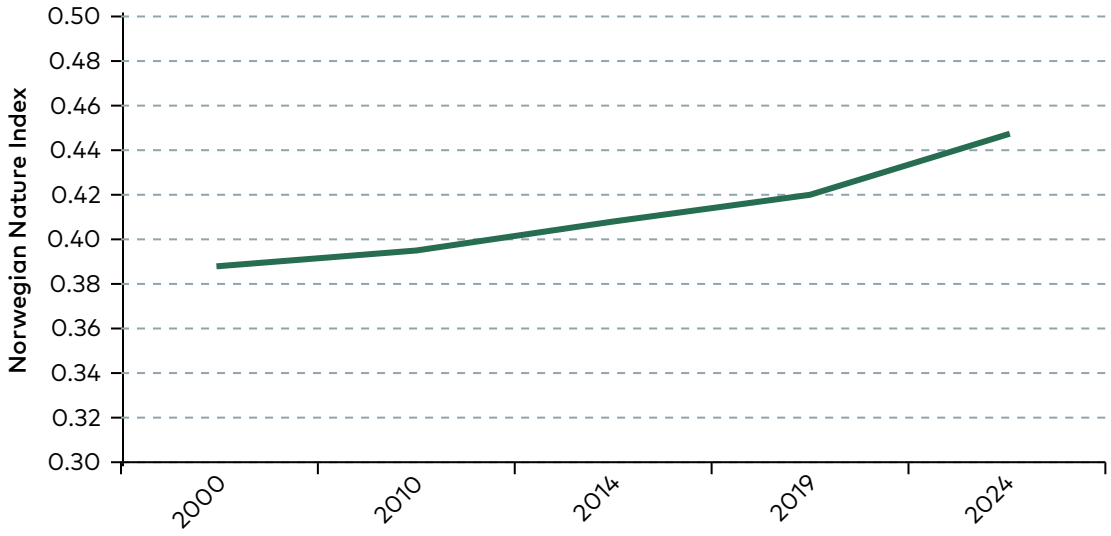


Figure 49: The Norwegian Nature Index for forests 2000–2024. Index=1 reflects the undisturbed ecosystem. Source: Naturindeks.no (Miljødirektoratet).

In Finland, Biodiversity.fi includes more than 110 indicators that reflect the state and development of various components of biological diversity, as well as the factors driving changes in Finland's nature.

Deadwood volume

Standing and fallen dead wood at different stages of decomposition is a key habitat for many insects, fungi, lichens, and birds. In Fennoscandia, more than 5,000 species are considered dependent on dead wood for food, shelter, or reproduction. Historically, natural boreal forests contained substantially more dead wood than today's managed forests, with estimates in Sweden ranging from 40 to more than 100 m³ per hectare in the natural boreal forest.

In 2020 (SoEF 2025), reported dead wood volumes averaged:

- 10.1 m³/ha in Sweden
- 9.4 m³/ha in Norway
- 6.4 m³/ha in Finland
- 6.3 m³/ha in Denmark.

Between 2005 and 2020, average dead-wood volumes across the Nordic countries increased by 35%, indicating a gradual structural enrichment of managed forests (Figure 50).

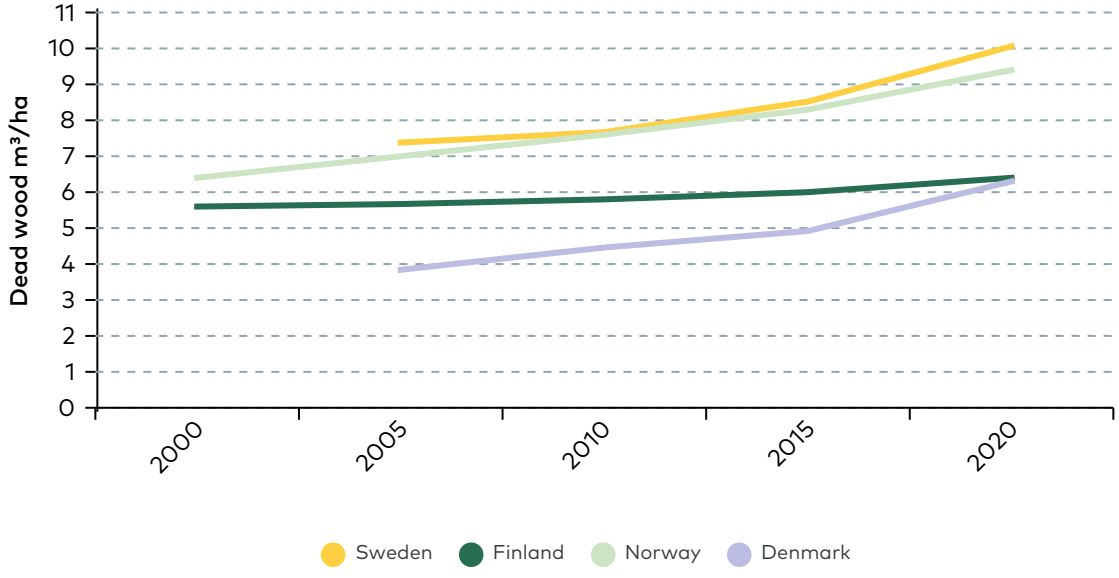


Figure 50: Development of dead wood volume in productive forests in Sweden, Finland, Norway, and Denmark, m^3 per hectare. Source: FRA 2025.

Many Central European countries report substantially higher dead wood volumes per hectare, partly reflecting higher growing stock, disturbance history and management systems (Table 22).

Table 22: Deadwood, volume per hectare, 2020, cubic metres in some central and eastern European countries with high volumes. Source: SoEF 2025 and FRA 2025.

	Switzerland	Slovakia	Slovenia	France	Germany	Czech Republic	Austria
Total deadwood	31.8	28.0	25.8	25.4	25.0	23.1	22.0
Standing deadwood	15.3	8.7	7.0	8.5	8.0	8.0	9.7
Lying deadwood	16.5	19.3	18.7	16.9	17.0	15.1	12.3

Old forest – the example from Sweden

The area of old forest is an important biodiversity indicator within Sweden's environmental monitoring system.

For this purpose, old forest is defined as stands older than:

- 120 years in southern Sweden
- 140 years in northern Sweden

Over the past 30 years, the area of old forest in Sweden has increased by 90% nd the turning point was when the new forest management legislation was introduced in 1993 (Figure 51).

Older forests often contain structures that are important for biodiversity, including dead wood, large trees, uneven age structure and specialised habitats.

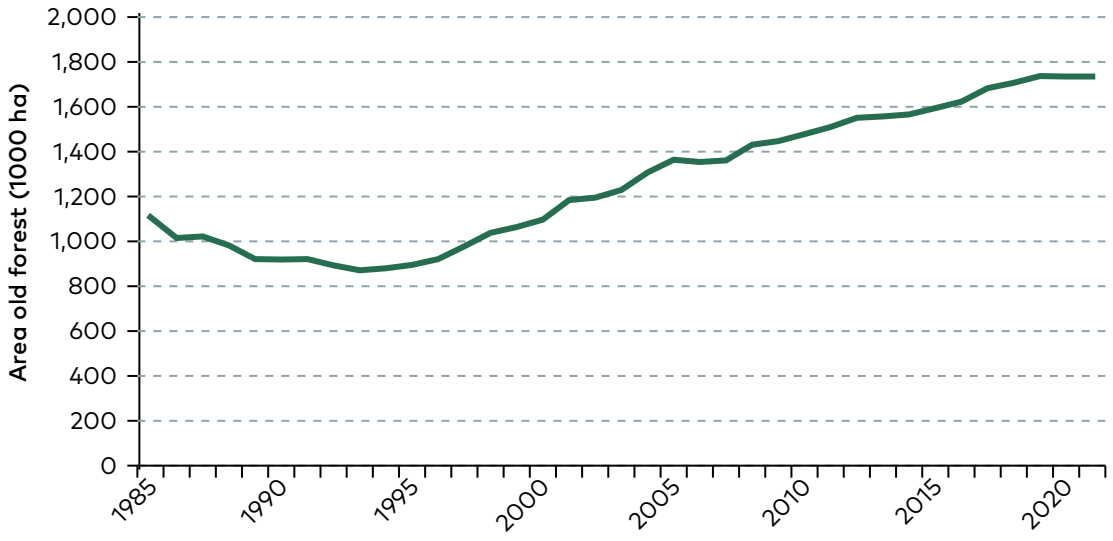


Figure 51: Area of "old forest" in Sweden (>120 years in southern Sweden, >140 years in northern Sweden) from the Swedish Environmental Objectives System. Source: sverigesmiljomal.se.

Common forest birds

The forest bird index is one of the biodiversity indicators supported by the European Commission. It reflects population trends among common breeding forest birds, based on large-scale surveys conducted by volunteer ornithologists.

Since 1980, the index has shown a declining trend in Northern Europe (Sweden, Finland, and Norway), although the trend has been broadly stable since 2000 (The Pan-European Common Bird Monitoring Scheme).

National indicators show somewhat different developments:

- Sweden reports a positive long-term trend for the 26 species included in the EU index, while another national indicator shows overall stability with declines in some species (Figure 52).
- Finland reports broadly stable forest bird populations during the 2000s, although species associated with old conifer forests have declined (Figure 53).
- Norway reports broadly stable trends in coniferous, deciduous, and mixed forests (Figure 54).

Bird indicators are useful because they reflect broader ecological changes in forest habitats over time.

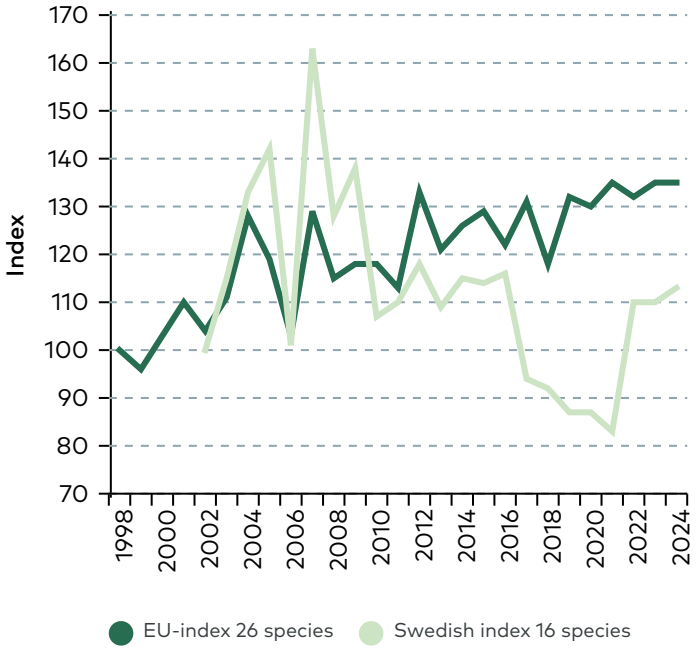


Figure 52: Indices for common breeding forest birds in Sweden (Swedish Environmental Objectives, 16 species) and the EU-selection of 26 species. Source: Svensk fågeltaxering.

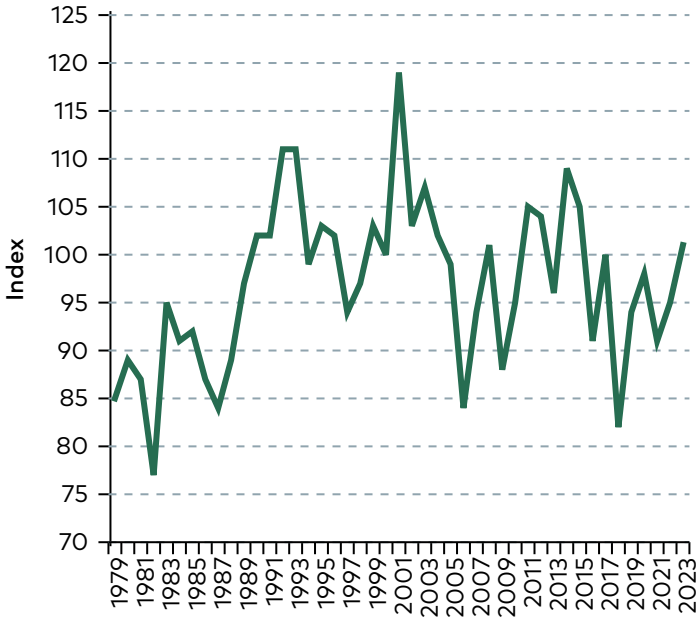


Figure 53: Common breeding forest birds in Finland. Source: Luonnontila.

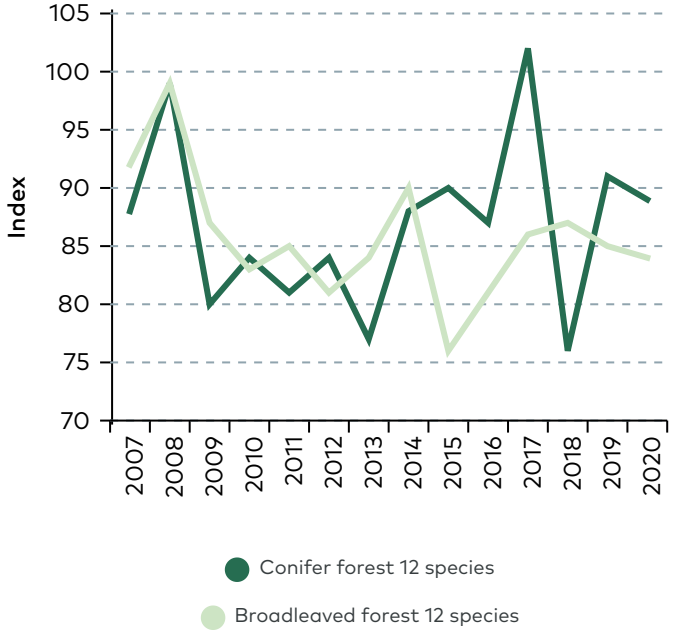


Figure 54: Common forest bird index 2007-2020 in Norway as a result of "Norsk hekkefuglovervåking". Source: Kålås et al. 2021.

7. Climate

7.1 Carbon stock

The Nordic forests account for 38% of Europe's forest carbon stock.

The total forest carbon stock in Europe was 26 billion tonnes in 2020, of which the Nordic countries accounted for 9.9 billion tonnes (FRA 2025).

Almost half of the total forest carbon is stored in soils, with the remainder distributed among above-ground biomass, below-ground biomass, litter, and dead wood (Table 23).

Table 23: Fractions of carbon stock in forest reported to FAO (FRA 2025) and Forest Europe (SoEF 2025). Data on litter and soil is missing for Norway. Million metric tonnes 2020.

	Sweden	Finland	Norway	Denmark	Iceland
Aboveground biomass	1073	689	379	36	0.9
Belowground biomass	252	200	101	8	0.2
Dead wood	213	18	17	0.9	0
Litter	645	254	-	10	0.4
Soil	2060	3811	-	108	5.2

Carbon stored in above-ground and below-ground biomass in Nordic forests increased by 29% between 1990 and 2020, reflecting continued forest growth and a rising growing stock (Figure 55).

This demonstrates the long-term role of Nordic forests as a significant carbon reservoir.

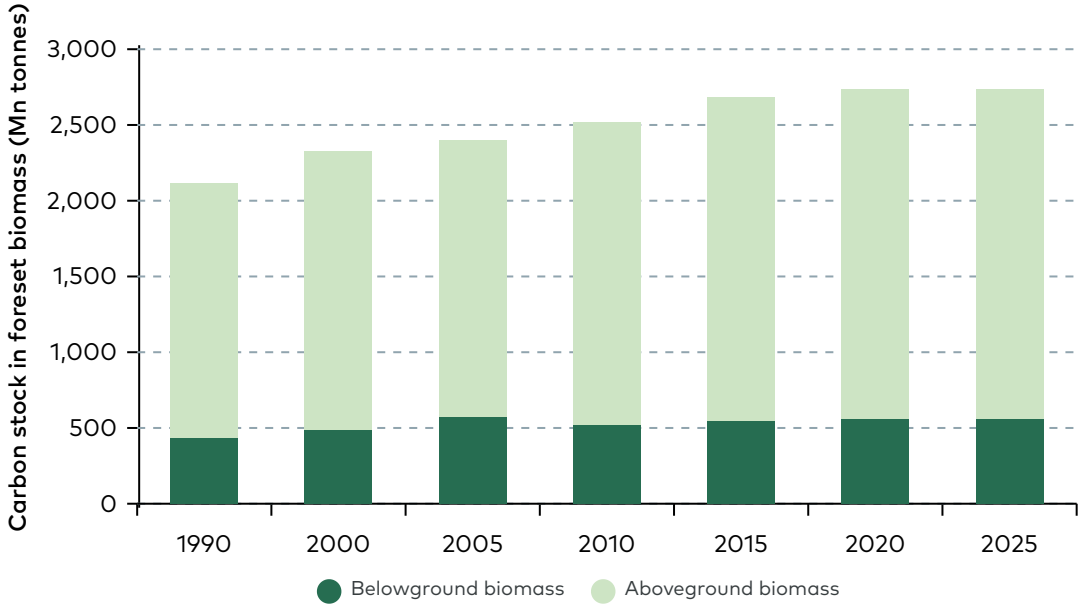


Figure 55: Belowground and aboveground biomass in forests in the five Nordic countries 1990-2025. Million metric tonnes. Source: FRA 2025.

7.2 Greenhouse gas emissions and LULUCF

Between 1990 and 2024, greenhouse gas emissions in the Nordic countries declined by 36%.

All countries that are parties to the United Nations Framework Convention on Climate Change (UNFCCC) report their greenhouse gas emissions and removals.

One reporting sector is LULUCF (*Land Use, Land-Use Change and Forestry*), which covers emissions and removals from land use and forest-related activities. Forest land often acts as a carbon sink, removing carbon dioxide from the atmosphere and thereby reducing net climate impact.

Between 1990 and 2024 (Figures 56-57), total greenhouse gas emissions in the Nordic countries declined by:

- -36% excluding LULUCF
- -35% including LULUCF

All Nordic countries except Iceland reduced their net emissions over the period when LULUCF is included.

Sweden stands out in particular, with very large net removals from forest land that contribute strongly to national climate outcomes. In contrast, Finland's forest land has lost its role as a greenhouse gas sink, a trend that has continued since 2010. An explanation could be a high proportion of drained organic soils, which contributed to high losses and increased commercial fallings, as well as different methods for monitoring carbon content compared to, for example, Sweden.

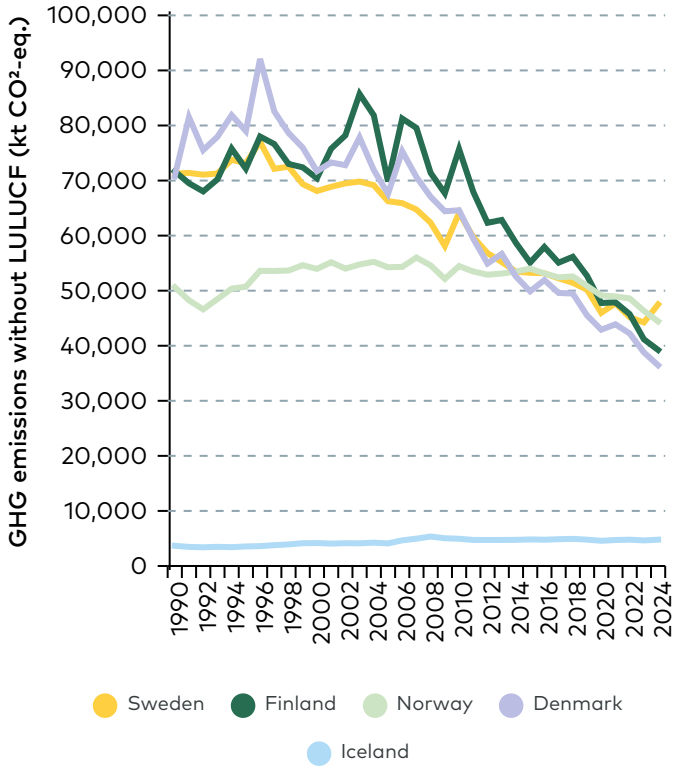


Figure 56: Greenhouse gas net emissions without LULUCF emissions/removals. Source: UNFCCC 2026, greenhouse gas profiles, annex 1.

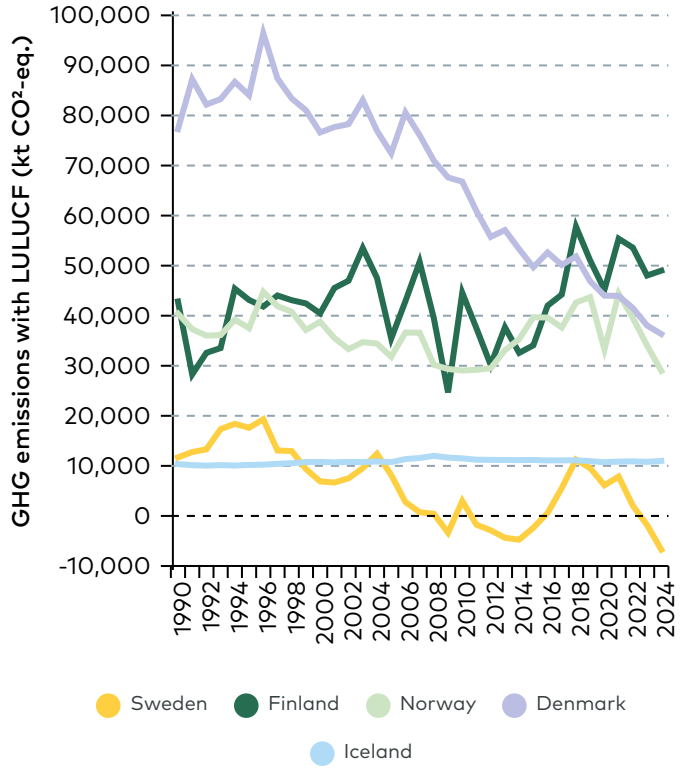


Figure 57: Greenhouse gas net emissions with LULUCF emissions/removals. Source: UNFCCC 2026, greenhouse gas profiles, annex 1.

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Mats Hannerz, Håkan Ekström and Johan Freij

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The Nordic Council of Ministers
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DK-1061 Copenhagen
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