**EFNA country reports 2025 part one.**

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| **Weather condition:** |
| **Austria**  **Belgium**   |  | | --- | | **In Belgium, too, we are feeling the effects of climate change. In recent years, extreme weather conditions have increased. Long periods of heat and drought alternate with soaking wet periods. There are fewer ice days during the winter.**  **2024 was the wettest year ever in our country and we had the highest groundwater level in 20 years. Since March 1, 2025, very little precipitation has fallen. When we compare the period from March 1, 2025, to May 8, 2025, with exactly the same periods from the past, this is the driest period of the entire series (since 1892). During the month of May there was also a very strong north-easterly wind with an extra drying effect.** |   **Czechia**  **Quite well in 2024, very dry in the 2025**  **Denmark**  **Total opposite to last spring: Sun and dry weather from end February. So again, history the sunniest spring and super condition for nursery work and customer as well.**  **Finland**  **France**  **Very bad season. After 3 seasons reaching 60 million of plants sold, this season we may only reach 55 million of plants.**  **Surcapacity production and the very rainy season will lead to an anormal level of destruction of plants.**  **Germany**   |  | | --- | |  |   **Autumn and Winter 2024 were OK, no Frost but too wet**  **Early 2025 too dry, driest since last centuries-**  **Hungary**  **Dry and hot.**  **Iceland**  **Ireland**  **After a reasonably good spring in 2024, the summer was cool and relatively dry. The autumn was milder and drier than normal. December and February were mild with a cool January. March and the first half of April was mainly mild and dry, with the second half of April wet in parts. Over the winter, Storm Darragh but mainly Storm Éowyn caused significant windblow damage to forests in certain parts of the country.**  **The Netherlands**  **Perfect, good planting conditions, maybe bit too dry in March**  **Norway**   |  | | --- | | **Vinter: cold and much snow**  **Spring: warm in the beginning and then a period of cold**  **Summer: warm and wet**  **Autumn: warm, wet, no snow** |   **Portugal**  **Sweden**  **For nursery activities very good autumn-winter-spring. There were also some early frosts during autumn 2024, that was otherwise good. The spring have started earlier than usual. In the southern part it is now close to drought.**  **United Kingdom**  **The past lifting and despatch season was extremely difficult due to the continually wet autumn. Harvesting machines could not work for much of the time, coldstores were not full when they should be, and making up orders for customers was very difficult for the bareroot sector especially. So much soil was lifted with the plants that bags had to have 100 plants, not 250. 250 in a bag was too heavy to lift! It was easier for cell grown nurseries.**  **The market was strong and customers were patient. Eventually nurseries were able to complete lifting. There were no major surpluses of unsold stock, although there is some concern that there is too much Sitka Spruce coming on in the nurseries.**  **Policy in the UK has reduced the maximum % allowed of a single species from 75% to 65 % . This is likely to reduce demand for SS, the main productive species in the UK. Other species will be planted instead. The UK timber and processing sector is very concerned about the future loss of commercial timber.**  **Governments ( England, Wales and Scotland ) are short of money. Grants for planting are uncertain going forward. The English hedging grant for farmers was stopped overnight without warning. Hedging is a big market for English nurseries especially. There is much native and conservation planting happening and Non Gov. organisations are leading the way on this.**  **The weather has changed – now we have had very little rain, and soils are so dry and warm in some areas that nurseries chose not to sow seed at the normal time – they waited for cooler weather or rain. Sowings are now going ahead, although we have still had nearly no rain. On the east coast of the UK it has been the driest spring for 65 years.**  **Pests and diseases are an increasing problem. We still steadily lose minor use chemicals. Research for new products and product registrations continues. IPM helps, but is only good vs a limited range of pests. Hylobius is still a big problem.**  **The order book is strong for the 25/26 planting season, but nurseries need more normal weather to help grow and handle the crops.** |

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| **INTERNAL MARKET, forest (summer 2024 to spring 2025):**  **Austria**  **Belgium**   |  | | --- | | **Sales on the internal market have been smoother than last year due to better harvesting conditions at the nurseries and good planting conditions at customers during the winter period. It has been difficult to keep prices high enough to prevent margins from decreasing. Turnover is lower than last year, but still acceptable. At the end of the season many plants were available but there was insufficient demand resulting in poor prices.** |   **Czechia**  **It dropped by about 30%. As well prices.**  **Denmark**  **Good marked for all forest plants and we are still delivering**  **Finland**  **France**  **France's ambition to plant 1 billion trees by 2030 is clearly not realistic.**  **There is not a national planning.**  **Huge drops in conifers like Douglas fir.**  **Germany**  **Normal inquiries resumed from June. In some federal states, there were funding issues that were only partially resolved.**  **There were declines in Southern Germany. From spring onwards, there was noticeable hesitation due to the federal election — many wanted to wait for the outcome. As a result, those parts of the market are considered lost for the current season.**  **Hungary**  **It was very weak, because of the delay with the subsidies**  **Iceland**  **Ireland**  **Demand increased this spring driven by additional areas getting approval for afforestation projects and the replanting of ash dieback sites. Some believe the lift in afforestation is temporary and will be hard to maintained next season. There was also good demand for native broadleaves, with non-forestry related companies supporting broadleaf planting in response to climate change and biodiversity initiatives.**  **The Netherlands**  **Very good, mainly all the species with forestry provenances. More broadleaves, huge drop in conifers like Douglas fir**  **Norway**   |  | | --- | | **Very good, high demand after forest plants. Every company sold out their production.** |   **Portugal**  **Sweden**  **The market this season has been OK. Some species are short but still some oversupply of Picea abies and some other species. Planting season 2025 in the forest started earlier than normal.**  **United Kingdom** |
| **INTERNAL MARKET, forest (forecast for next season):**  **Austria**  **Belgium**   |  | | --- | | **The government remains ambitious to achieve the forest plantation targets. We have been hearing this for years but are still looking forward to the big orders. We fear that shifting budgets towards defense spending and budget cuts to reduce government budget deficits will have an effect on government budgeting for trees and greenery in our municipalities and cities.** |   **Czechia**  **We expect another decreasing but not so drastic.**  **Denmark**  **The forecast is very fine**  **Finland**  **France**  **Germany**  **We expect demand to remain stable. The new federal funding budgets are unlikely to benefit the forestry sector.**  **Hungary**  **If the subsidies coming in time, it should be better.**  **Iceland**  **Ireland**  **Uncertainty remains around the afforestation levels. With a new Government and Minister with responsibility for forestry in place, many are hoping a review of the criteria around land eligibility will take place. However, this will take time, with the current focus largely set on dealing with the fallout from Storms Darragh and Éowyn. There will be an increase in demand as the windblown sites get cleared, but it is expected to be modest as harvesting capacity is diverted from standing timber sites to concentrate on windblow sites.**  **The Netherlands**  **Very good, mainly all the species with forestry provenances. More broadleaves, huge drops in conifers like Douglas fir.**  **Norway**   |  | | --- | | **Very good, high demand after forest plants. Every company will sow in more plants.** |   **Portugal**  **Sweden**  **Probably decreasing due to less harvesting in the forests. There is a difference in geography.**  **United Kingdom** |
| **INTERNAL MARKET, landscaping, garden center (summer 2024 to spring 2025):**  **Austria**  **Belgium**   |  | | --- | | **Landscapers & garden contractors: sales of forest nursery (hedging) plants are lower or remain at the same level, depending on the situation. Garden centers: customers make smaller purchases in general (smaller pot/plant sizes). In general, few sales of forest plants are through garden centers.** |   **Czechia**  **Stable.**  **Denmark**  **Landscaping has been fine and is still very fine**  **The garden center marked is better than last year, and some change in structure of the old center.**  **The hedge market is slow and only Ligustrum is sold out. So, the forecast was right**  **Finland**  **France**  **A very good season.**  **Germany**  **Hungary**  **It was better than last year.**  **Iceland**  **Ireland**  **Demand for native broadleaved species such as Crataegus, Ilex and Corylus was strong, driven by grants to plant new hedgerows on farmland. In addition, an uptake in planting small areas of native species also helped to increase demand.**  **The Netherlands**  **Very good, a lot of sorts sold out early. Overproduction in laurels**  **Norway**  **Portugal**  **Sweden**  **Forest Nurseries are not active in these markets**  **United Kingdom** |

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| **INTERNAL MARKET, landscaping, garden center (forecast for next season):**  **Austria**  **Belgium**   |  | | --- | | **Landscapers & garden contractors: sales of forest nursery (hedging) plants are lower or remain at the same level, depending on the situation. Garden centers: customers make smaller purchases in general (smaller pot/plant sizes). In general, few sales of forest plants are through garden centers.** |   **Czechia**  **Same as 2024/2025**  **Denmark**  **Landscaping looks fine**  **For garden center it will probably decreasing a little and the same for hedge plant marked.**  **Finland**  **France**  **Funding for hedge projects is down sharply.**  **We can expect a significant drop**  **Germany**  **Hungary**  **It was very good, better than last year.**  **Iceland**  **Ireland**  **Demand for native broadleaf species is likely to remain good for next season as the grant scheme remains in place.**  **The Netherlands**  **Looking good.**  **Norway**  **Portugal**  **Sweden**  **Forest Nurseries are not active in these markets**  **United Kingdom** |
| **EXPORT MARKET (summer 2024 to spring 2025):**  **Austria**  **Belgium**   |  | | --- | | **The selling season in the beginning was characterized by less demand and later orders. The sales season ended too early due to warm weather conditions in spring 2025. In general prices were under pressure. The market can generally be compared to the situation in 2019 (pre-corona). Turnover is lower than the period 2021-2023.** |   **Czechia**  **Slightly increasing.**  **Denmark**  **It has been good for most species except hedge plants**  **Finland**  **France**  **Slightly increasing.**  **Germany**  **Hungary**  **It was better than last year, especially Populus, Salix ssp-s.**  **Iceland**  **Ireland**  **There were some exports of forestry plants, but numbers appear to be relatively small and not a market most nurseries focus on.**  **The Netherlands**  **Good, Less sales to Germany**  **Norway**  **Portugal**  **Sweden**  **Stable - Small volumes**  **United Kingdom** |
| **EXPORT MARKET (forecast for next season):**  **Austria**  **Belgium**   |  | | --- | | **The market situation for next season will depend on the weather conditions en the demand during the coming winter. Can the governments realize their ambitions regarding the promised areas of forest plantations? Finding sufficient (suitable) plots to plant forests apparently poses a problem in Belgium.** |   **Czechia**  **Stable**  **Denmark**  **Some species are already sold out so leaser demand for main species.**  **Finland**  **France**  **Germany**  **Hungary**  **We hope will be as the same as last year or better**  **Iceland**  **Ireland**  **With demand for native broadleaves up and with the fallout of Storms Darragh and Éowyn, companies will most likely find a ready market for their stock at home without having to look at exports. Most sales will likely be opportunist rather than planned.**  **The Netherlands**  **Good.**  **Norway**  **Some of the nurseries in Norway exports spruse to Sweden**  **Portugal**  **Sweden**  **Stable - Small volumes**  **United Kingdom** |